eMARS 602
ADVANCED PROCUREMENT

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eMARS Advanced Procurement

1 – Orientation

The Central Procurement process involves the activities by which professional Buyers establish Agreements or one time Contracts through the Competitive Bidding Process. In also includes Contract and Agreement management functions like Vendor Performance Evaluation, Agreement Renewal, and Award Termination.

eMARS contains several features that provide additional support to users in their Central Procurement activities. The eMARS Procurement Workspace consolidates in one place the links to the documents and inquiries you will need to complete Central Procurement functions. eMARS also provides a **Procurement Type** field used to identify the Business Process being followed to procure goods or services for a given requirement. **Procurement Type** controls which documents may be processed, how Vendors will be evaluated in the Post Award state, and which Authorities may be cited on an Award Document.

This Advanced Procurement class is designed to provide you with a detailed understanding of the Commonwealth of Kentucky's procurement process and the eMARS procurement functionality as it relates to a Procurement professional job functions and responsibilities.

Prerequisites

You should complete the following courses before continuing:

- eMARS101 Introduction to eMARS
- eMARS601 General Procurement

Learning Objectives

At the conclusion of this session, you will be able to:

- Conduct a Competitive Sealed bid using Solicitation (**RFP**), Solicitation Response (**SRW**) and Evaluation (**EV**) documents
- Load a Catalog referencing a Master Agreement (**MA**)
- Process a Stand-alone Contract (**CT**)
- Process a Master Agreement Renewal (**RN**)
- Terminate a Contract or Master Agreement (**TM**)
- Re-assign a Procurement Folder to the correct team.
- Track documents and work in progress using Lifecycle Inquiry (**LINQ**)

Document Codes & Listings

The following table displays the Procurement document codes currently used by end-users in MARS and the corresponding new Procurement document codes in eMARS

DOC CODE	DOC TYPE	DOC NAME	PURPOSE AND NOTES
PE	ADM	Performance Evaluation	Record Vendor Performance - Evaluators must be set up on the PEEVALR table by the contract administrator. Based on the Document ID
RN	ADM	Renewal	Used to extend the Master Agreement effective dates by the next renewal period. The periods must be established on the MA document. Created by Copying Forward to a RN document. The RN when submitted creates a new modification of the MA which must be submitted through workflow. The Modification won't be generated until a batch cycle is run during the nightly cycle on the documents indicated effective date.
TM	ADM	Termination	Created by the contract administrator by copying forward from the award document. When submitted to final, a draft modification is created immediately for submitting to workflow. Reason for change is already populated with the reason for termination from the RN document.
CT	AWARD	Contract - 3 Way Match	Created only by Centralized Procurement agencies (OMPS, KYTC, DECA and AOC) to be referenced by other user departments. Used for one time purchases of goods. Must be created with the end user department's document code in the header so that the dept can create the payment document. Requires a Receiver (RC) document and an Invoice (IN) document to be processed. The PRM will be auto-generated when the 3 way match is detected.
CT2	AWARD	Contract - 2 Way Match	Created only by Centralized Procurement agencies (OMPS, KYTC, DECA and AOC) to be referenced by other user departments. Used for one time purchases of services and for those agencies who have received an exemption from 3 way match requirements. Must be created with the end user department's document code in the header so that the dept can create the payment document. Requires an Invoice (IN) document to be processed. The PRM will be auto-generated when the 2 way match is detected.
CTT1	AWARD	Contract - 3 Way Match	Created only by KYTC. Must be created with the end user Department's Document Code in the header so that the Department can create the payment document to be processed. The PRM will be auto-generated when the way match is detected.
CTT2	AWARD	Contract - 2 Way Match	Created only by KYTC. Used for one time purchases of services who have received an exemption from 3 way match requirements. Must be created with the end user department's document code in the header so that the dept can create the payment document. Requires an Invoice (IN) document to be processed. The PRM will be auto-generated when the 2 way match is detected.
DO	AWARD	Delivery Order - 3 Way Match	Created by the end user department from the URCATS search. URCATS only results in a DO award which requires 3 way matching. It references a Master Agreement or MA catalog lines. Payment is made by processing a Receiver (RC) and Invoice (IN) document. The PRM will auto generate when the 3 way match is detected.

DOC CODE	DOC TYPE	DOC NAME	PURPOSE AND NOTES
DO2	AWARD	Delivery Order - 2 Way Match	Created by the end user department from the URSRCHMA search. User must select DO2 as the target document. It references a Master Agreement or MA catalog lines. Payment is made by processing an Invoice document the PRM will be auto generated when the 2 way match is detected.
MA	AWARD	Master Agreement	Created only by Central Procurement Departments. For recurring or blanket procurement needs. Does not place an order for any goods or services, but establishes pricing and terms and conditions for future purchases for a given period. Can be renewed based on defined renewal periods. Can be individual lines or catalog. Referenced by users either by URCATS or URSRCHMA. Direct payment can be made referencing a MA line or catalog by generating a PRC on the Commodity Group component of the UR Document.
PO	AWARD	Purchase Order - 3 Way Match	Created only by Decentralized Procurement agencies. Used for one time purchases of goods. Must be created with the end user department's document code in the header so that the dept can create the payment document. Requires a Receiver (RC) document and an Invoice (IN) document to be processed. The PRM will be auto-generated when the 3 way match is detected.
PO2	AWARD	Purchase Order - 2 Way Match	Created only by Decentralized Procurement agencies. Used for one time purchases of services. Must be created with the end user department's document code in the header so that the dept can create the payment document. Requires an Invoice (IN) document to be processed. The PRM will be auto-generated when the 2 way match is detected.
PON2	AWARD	Purchase Order	Created by any Department for all Personal Service Contracts/Grants/MOA's which require review by the Government Contract Review Committee. Requires completion of the PON information. Otherwise is exactly the same as a PO document. NO MATCHING REQUIRED. Users make payment by copying forward from the award to a PRC.
EV	EV	Evaluation Document	Created by the buyer to consolidate all Solicitation Responses, enter scoring, award justification. The resultant award is generated from within the EV document.
EVT	EV	Evaluator	Used when using a team for evaluations. EVT documents are loaded into the EV document for use in evaluations.
IN	IN	Invoice	The electronic representation of the vendors invoice in the system. This is not a payment document. It is the vendors billing. User is to enter the invoice date, as shown on the paper invoice, and calculate the payment date, based on the vendor terms.
RIN	IN	Invoice	A Recurring invoice established to generate a matching PRM for recurring monthly payments such as leases, copiers, and other consistent bills.
RC	RC	Receiver	Documentation that the goods were received. Required of all 3-way match awards.
PRC	PRC	Payment Request	The PRC payment document may be created by the end user as a standalone document or reference awards or master agreements with external vendors.
PRCI	PRCI	Internal Payment Request	The PRCI payment document is created by the end user and must reference an award or master agreement with an internal vendor.
PRM	PRM	Payment Request	The PRM payment document is system generated through the two-way or three-way matching process for payment to external vendors.

DOC CODE	DOC TYPE	DOC NAME	PURPOSE AND NOTES
PRMI	PRMI	Internal Payment Request	The PRMI payment document is system generated through the two-way or three way matching process for payment to internal vendors. No check or EFT is created. Money is transferred between agencies.
RQS	RQ	Standard Requisition	Usually created from scratch to request goods or services. Used by all departments.
UR	RQ	Universal Requestor	Created from URCATS, and will result in a DO or RQS dependent on whether an item is available on contract or not.
BAFO	SO	Best and Final Offer	Used for a subsequent round of responses to an RFP, limited only to those finalists from preliminary round.
RFB	SO	Request for Bids	Can only be issued by OMPS, DECA, KYTC and AOC.
RFI	SO	Request for Information	Does not result in award, just seeking information on possible solutions, market conditions, etc.
RFP	SO	Request for Proposals	Used by any department for all Personal Service Contracts, or by Central Procurement agencies for complex procurements.
RFQ	SO	Request for Quotes	Issued by any department for solicitation of goods or services within the small purchase delegation for the department.
SR	SO	Solicitation Response	Used to record the vendor's response to a solicitation.
SRW	SO	Solicitation Response	Same as the SR, but generated through the Solicitation Response Wizard.
VCC	VC	Vendor/Customer Creation	Creates a Vendor record. Processed for approval by Statewide Accounting Services
VCM	VC	Vendor/Customer Modification	Modifies a Vendor record. Processed for approval by Statewide Accounting Services
RPO		Recurring Payment Order	Establishes a schedule resulting in regularly produced orders for goods or services. Likely uses include regular stocking of items such as lab tests, which are required to always be fresh.

2 – Commonwealth of Kentucky Procurement Process

Procurement Lifecycle

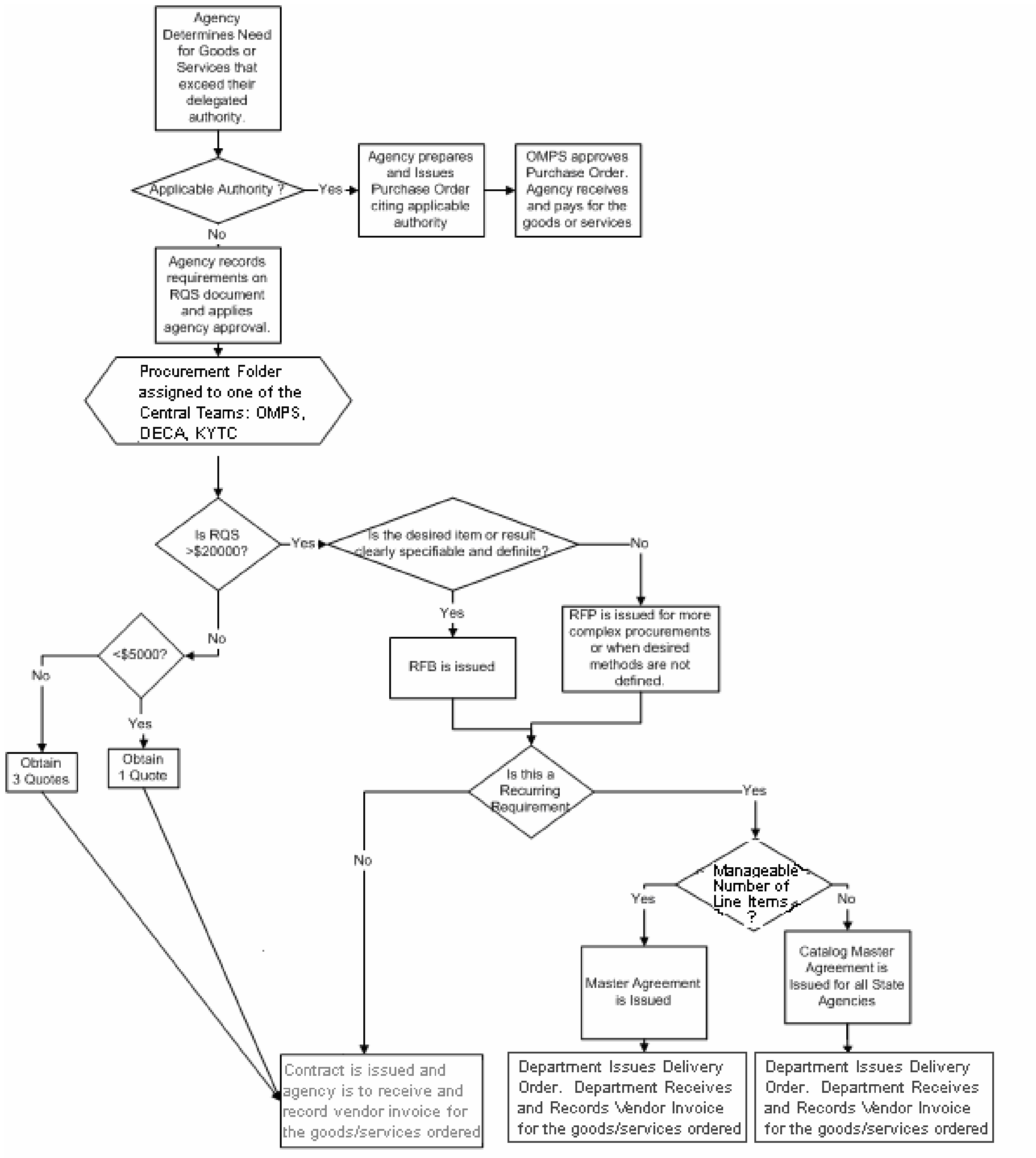
The Commonwealth's procurement lifecycle consists of the following six major phases:

- **Requisition** – a request for goods or services is created.
- **Solicitation** – requirements for goods or services are advertised and Vendors are requested to submit information, quotes, bids or proposals.
- **Solicitation Response** – Vendor responses to Solicitations are received and recorded.
- **Evaluation** – Vendor responses to a Solicitation are evaluated for award.
- **Award** – formal agreements are established with a Vendor to either purchase goods or services or set prices for future purchases.
- **Post Award** – the activities that take place during the remainder of a Vendor contract after award.

It is not required that every procurement go through all of the above procurement phases or to proceed through these phases in sequence. The only two required phases are Award and Post Award.

Central Procurement users will typically perform activities associated with the Solicitation, Solicitation Response (**SR**/**SRW**), Evaluation (**EV**) and Award phases.

Kentucky's Departments generally follow the processes detailed in the following diagram:



Requisition

In the Requisition phase, a user creates a request for the desired goods or services. For procurements that exceed an agency's Delegated Authority, a user must prepare a Requisition (**RQS**) document in eMARS to describe the requirement, receive departmental approval, and route to the Office of Material and Procurement Services (**OMPS)** or the Department of Engineering and Contract Administration (**DECA)** for subsequent processing.

> NOTE: The Commonwealth will only use the Standard Requisition (**RQS**) document code. Depending on the **Procurement Type**, the **RQS** may be optional.

Solicitation

The eMARS Solicitation phase encompasses the documents and events used to advertise a requirement and request Vendors to submit information, quotes, bids, or proposals. The Solicitation phase has only one document type, Solicitation (**SO**). eMARS uses the following six distinct document codes:

- **RFI** (Request for Information) – Used to gather information when a conceptual need has been identified, but the detailed requirements needed to achieve the goal still need to be defined.
- **RFP** (Request for Proposal) – Used to advertise procurements that may not have exact parameters. Used by Agencies to bid Personal Service Contract. May or may not be commodity driven.
- **RFQ** (Request for Quote) – Used for informal solicitations for goods or services.
- **RFB** (Request for Bid) – Used for procurements where the Commodities for goods or services are delineated and the required amount is greater than a department's small purchase delegation.
- **BAFO** (Best and Final Offer) – Used in the second round of an **RFP**. Selected respondents are provided the opportunity to alter their original response to reflect their best and final offer for the Solicitation.
- **RA** (Reverse Auction) – Used for solicitations to auction off goods to the lowest bidder.

Depending on the **Procurement Type**, the Solicitation phase may be optional.

The Solicitation documents do not have any **Event Types** tied to them, as they do not perform any accounting updates upon submission.

Solicitation Response

Vendors respond to Solicitations issued by the Commonwealth, and their responses are recorded. The Solicitation Response (**SR**) phase encompasses the documents and events used to record a Vendor's response to a solicitation.

Solicitation Response is divided into two main areas:

- Vendor Functionality – operates as a separate application, Vendor Self Service (**VSS**) integrated with eMARS.
- Buyer Functionality – the Buyer performs the following function from eMARS: Enters responses for Vendors not registered in Vendor Self Service (**VSS**).

There is only one Solicitation Response document type, Solicitation Response (**SR**), and two Solicitation Response document codes:

- Solicitation Response (**SR**)
- Solicitation Response Wizard (**SRW**)

Depending on the Procurement Type, the Solicitation Response phase may be optional.

Evaluation

The Evaluation phase encompasses the documents and events used to evaluate a Vendor's response to a Solicitation. Once all bids have been received, and a solicitation closing date has passed, the procurement moves into the Evaluation phase where responses are inspected, analyzed, and ranked against all other responses by designated evaluators.

There is only one Evaluation document type, Evaluation (**EV**). The Evaluation document type has two distinct document codes:

- Evaluation (**EV**)
- Evaluator (**EVT**)

Award

Awards range from contracts for consulting services to Master Agreements for office supplies. The Award phase is the ONLY mandatory phase in the Procurement Process.

The Award phase encompasses the documents and events used to establish a formal agreement with a Vendor, either to purchase defined goods or services or to set prices for future purchases.

The following eMARS documents may be used in the Award phase:

- Purchase Order (**PO**/**PO2**) – Decentralized Department generated awards within their small purchase or other delegation
- Contract (**CT**/**CT2**) (**CTT1**/**CTT2**-KYTC only) – Centrally generated awards created for user agencies
- Master Agreement (**MA**) – Fixed or fluctuating price agreements for a stated period of time
- Delivery Order (**DO**/**DO2**) – Encumbering orders from Master Agreements
- Proof of Necessity Agreement (**PON2**) – Personal Service Contracts, Memoranda of Agreements and Grant Agreements that require a Proof of Necessity and review by the Government Contract Review Committee.

Post Award

The Post Award phase begins immediately after an Award has been made to a Vendor and encompasses the documents and events that take place during the remainder of the life of the contract.

Post Award encompasses three main areas:

- Matching (receipt of goods and payment)
- Vendor Performance (**PE**)
- Contract Administration

The following eMARS documents may be used in the Post Award State:

- Receiver (**RC**)
- Invoice (**IN**)
- Vendor Performance Evaluation (**PE**)
- Termination (**TM**)
- Renewal (**RN**)

The **TM**, **RN** and **PE** documents are covered in this Advanced Procurement course.

The Post Award phase is also used as the central repository for all documentation associated with the Contract Management of a Procurement (e.g. Bid Deposits, Insurance Certificates, Warranties, Bonds, Retainage, Liquidated Damages, etc.).

Procurement Folder

The **Procurement Folder** is the central repository for documents and documentation related to a single procurement. eMARS compiles all activities, documents, and related correspondence for a procurement into a virtual **Procurement Folder** that ties multiple procurement documents and documentation items together. The **Procurement Folder** provides a single point for tracking, assigning, and reporting during the procurement life cycle. Each procurement document will belong to a specific **Procurement Folder**.

Each folder has a unique identification number generated by eMARS which allows users to identify the procurement documents and documentation items that apply to a particular purchase. Each folder also has a **Procurement Title** to easily identify the **Procurement Folder**. The **Procurement Title** is displayed on various procurement related pages to aid in identifying the proper folder for a specific procurement.

Procurement Types

Procurement Types are used to classify and group similar purchases. **Procurement Type** is used to identify the Business Process being followed to procure goods or services for a given requirement. **Procurement Type** controls which documents may be processed, how Vendors will be evaluated in the Post Award state, and which Authorities may be cited on an Award Document.

For each **Procurement Type**, business rules for processing are assigned that include the following:

- Manager
- Required phases (e.g. Requisition, Award, etc.)
- Allowable Documents (e.g. **RQS**, **PO**, **RC**, **IN**, etc.)

A Performance Evaluation Template is assigned to each Procurement Type. This template determines the evaluation criteria to use when creating a Performance Evaluation (**PE**) document.

Certain Cited Authorities are only applicable to certain Procurement Types. When completing an award document it is important to select the Procurement Type first as this action will filter the list of Cited Authorities to show only those that are relevant.

Cited Authorities

In order for a purchase to be legally processed, the Commonwealth of Kentucky requires a **Cited Authority** to be associated with each award and each payment document. This information is required when creating award and payment documents.

Proper completion of the **Cited Authority** field is *required* for the Commonwealth of Kentucky to comply with an agency's pre-audit delegation agreement resulting from **FAP 120-13-00 (Decentralization of the Pre-Audit Function)**.

Cited Authority represents the statutory, regulatory or policy citation – for example, "**FAP 111-55-00**"

Cited Authority is required on Award Documents and Payment Request and ABS Documents where there is no reference or only a memo reference to an award. **Cited Authority** is not required on Requisition or Solicitation documents.

The validation of the **Cited Authority's** minimum and maximum amount will occur at the document header level – the document amount and NOT the individual line amounts.

NOTE: The combination of Document Department, Document Code, Procurement Type and Dollar Value determine if a Cited Authority is applicable to the award document you are attempting to process.

3 – eMARS Procurement Document Sections

eMARS Procurement documents have a Header section and up to eight Detail Sections. The following paragraphs provide an overview of what each section is used for and the types of information that will be entered.

Header – The **Header** section lists general information associated with the entire document.

Vendor – The **Vendor** section provides Vendor information pertaining to:

- Suggested Vendors for providing the goods/services (Requisition phase documents)
- Vendor associated with a Solicitation Response (Solicitation and Evaluation phase documents)
- Vendor awarded a contract (Awards phase)

Vendors are selected from a pick list that is populated by the Vendor/Customer (**VCUST**) table.

Sub-Vendors – The Sub-Vendors section lists sub-vendors or sub-contractors associated with the procurement. NOTE that commodity lines are not linked to the sub-vendors.

Accounting Distribution – The Accounting Distribution section lists the fund distribution across multiple line items. This information allows for the distribution of Commodity costs across multiple Accounting lines based on percentages.

Terms and Conditions – The Terms and Conditions section lists the terms and conditions associated with the document. The Terms and Conditions (**TRMC**) table is used to establish "pre-established" terms and conditions for selection on this detail section. Terms and Conditions defined on the **TRMC** table can include attachments that will be included in this detail section of the document. In eMARS, users will be able to attach MS-Word documents in **.XML** format to be the Terms and Conditions.

Commodity – The Commodity section lists all commodities (goods or services) associated with the document. The Commonwealth will use a simpler 5 digit Commodity Code allowing the user to provide more descriptive Commodity information.

Accounting – The Accounting section lists the Accounting funds for each Commodity line.

Posting – The Posting Section lists the posting information for each Accounting line.

NOTE: As a general rule, for most procurement documents the Sections that you will navigate to are:

- **Header**
- **Vendor (**This is optional on RQ and SO document types)
- **Terms and Conditions –** On Solicitation and Award Documents
- **Commodity**
- **Accounting Distribution** – While not required, this is a shortcut to populating funding information when all commodity lines contain identical funding or mostly the same funding elements
- **Accounting**

To assist with the logical flow of processing, it is recommended that the Sections be completed in the order listed above.

4 – Solicitation Process

The competitive bidding process in eMARS begins with the Solicitation document. The Solicitation document is used to define the requirements/specification for the items or services being requested and the Terms and Conditions for doing business with the Commonwealth.

When the Solicitation is submitted to Final status, eMARS will build a Bid Package for Vendors, send e-mail notification to Vendors who are registered for the listed commodities and who are listed in the Suggested Vendor list. The bid package will be available on the Vendor Self Service (VSS) web-site from which it may be downloaded.

Solicitation Documents

There are several types of Solicitations documents in eMARS that perform similar but slightly different business functions. Please use the following table as a guideline for when to use each:

Solicitation Document Code	Business Use
RFB (Request for Bid)	Used for procurements where the commodities for goods/services are clearly defined.
RFP (Request for Proposal)	Used to propagate procurements that may not have exact parameters. May or may not be commodity driven.
RFQ (Request for Quotations)	Used by departments for competitive opportunities under a department's three quote limit.
RFI (Request for Information)	Used to gather information when a conceptual need has been identified, but the detailed requirements needed to achieve the goal need to be defined.
BAFO (Best and Final Offer)	Second round of **RFP**. Selected respondents are provided the opportunity to alter their original response to reflect their best and final offer for the Solicitation.
RA (Reverse Auction)	Solicitation used to generate a Reverse Auction. Vendors must be pre-registered to participate. All Vendors can see the lowest bid.

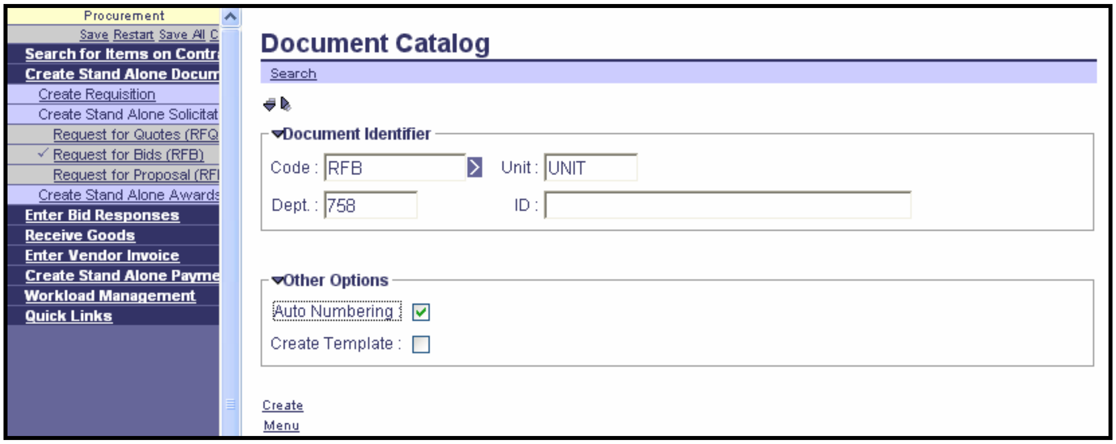
Solicitation documents may be created using one of three ways:

1. Directly from your **Procurement Workspace** not referencing any Requisition;
2. By **Copying Forward** from a Requisition (**RQS**) submitted by a Department;
3. By **Copying Forward** from a Solicitation into a Best and Final Offer (**BAFO**) document.

Create a Solicitation

Access your **Procurement Workspace** on the Home page and click the **Create Standalone Document** link in the Secondary Navigation Panel. Expand the **Create Standalone Solicitation** section. Click **Request For Bids (RFB)**. The Document catalog will open.

Click **Create** to switch into create mode.

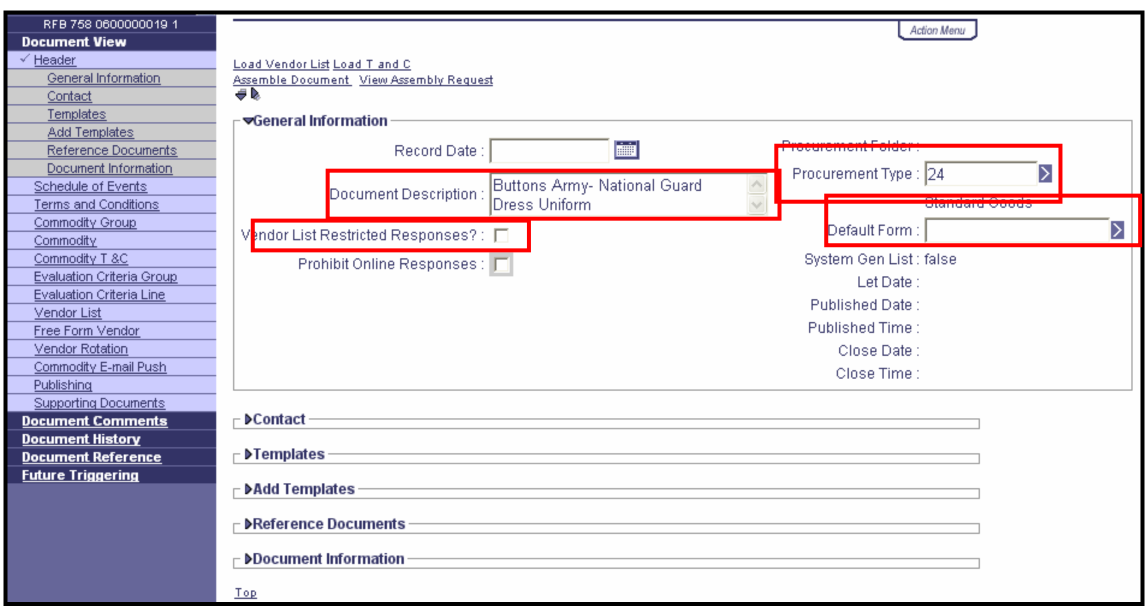


Enter the **Department Code** and **Unit Code** in their respective fields.

Click **Auto Numbering**

Click **Create** to create the **RFB** document. The document opens to the **Header** page.

Complete the required fields in the Solicitation document Header:

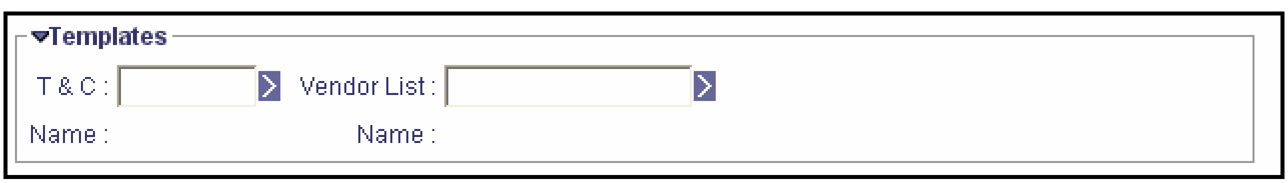


- The **Document Description** is required and does print-out. The description is also searchable from various inquiries like the Procurement Document Inquiry (**PRCUDOC**).
- Select a **Procurement Type ID** that corresponds to the business process being followed.
- If the **Vendor List Restricted Responses** check-box is selected then only those Vendors on the Vendor List Section may submit a Bid/Response through Vendor Self Service (**VSS**).
- eMARS uses the **Default Form** field during the assembly process to determine the lay-out of the assembled Solicitation. Kentucky will only be using one Form for solicitations, so leave this field blank and the correct Form will default when the document is submitted.

Complete the Contact Section

- The **Issuer ID** field will default to your information. If your are completing the document on someone else's behalf then pick their record from the pick-list by clicking on the **<u>arrow</u>** next to the **Issuer ID** field.
- The **Requestor ID** field will be blank and will need to be completed. The **Requesting ID** field is used to identify for whom the goods or services are being requested (e.g. who will actually be using the items or services detailed on this Requisition). Pick their record from the Requestor pick-list by clicking on the **<u>arrow</u>** next to the **Requestor ID** field.

Complete the **Templates** Section (optional). This section is used to Select either a **Terms and Conditions** template or a **Vendor List** template to pre-populate there respective sections with the data from the Template.

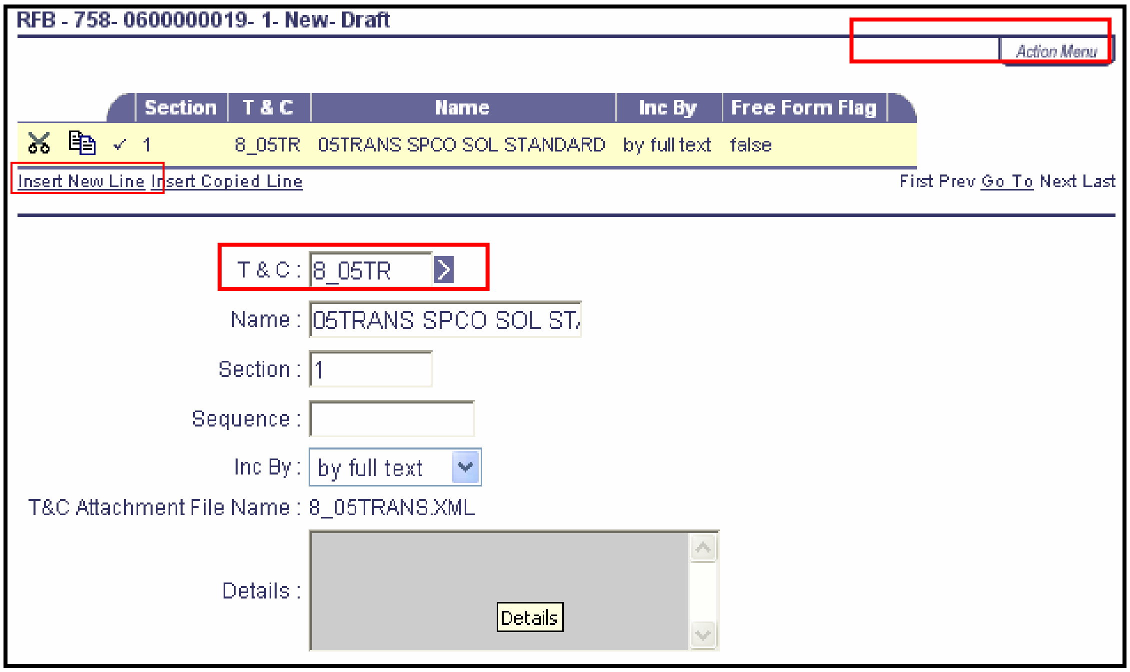


- The **T&C** pick-list allows you to select a **Terms & Conditions** template that will be used to automatically populate the **Terms & Conditions** section of this Solicitation document. To initiate the load click on the **<u>Load T and C</u>** link once you have selected the template.
- The **Vendor List** pick-list allows you to select a Vendor List that will be used to automatically populate the **Vendor List** section of this Solicitation document. To initiate the load click on the **<u>Load Vendor List</u>** link once you have selected the template.

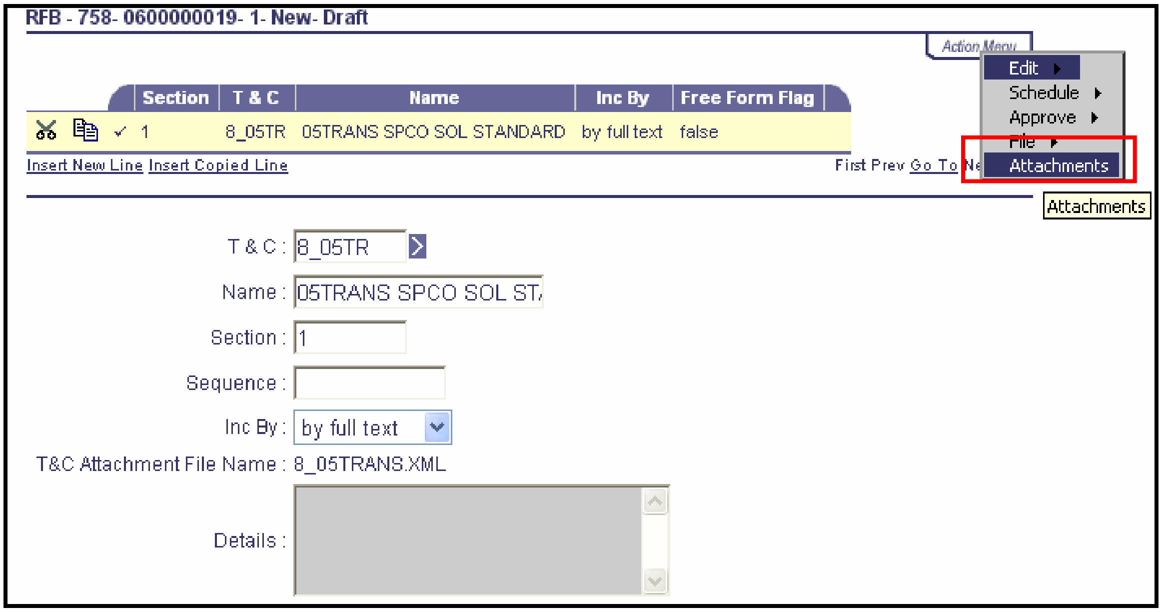
Complete the Terms and Conditions component. **Terms and Conditions** are created by attaching a Word Document, saved as .**XML**, to a **Terms and Conditions** record in the **Terms and Conditions** section. Kentucky's standard **Terms and Conditions** have been loaded into eMARS and you may also select one to many of these to be included in the printed document. You may also modify the Standard Terms and Conditions as you see fit.

To select a standard T&C and modify, follow these steps:

Navigate to the **Terms and Conditions** section and click **Insert New Line**. When the record has been added please click on the **arrow** next to the field to select a Standard **Terms and Conditions** from the pick-list.

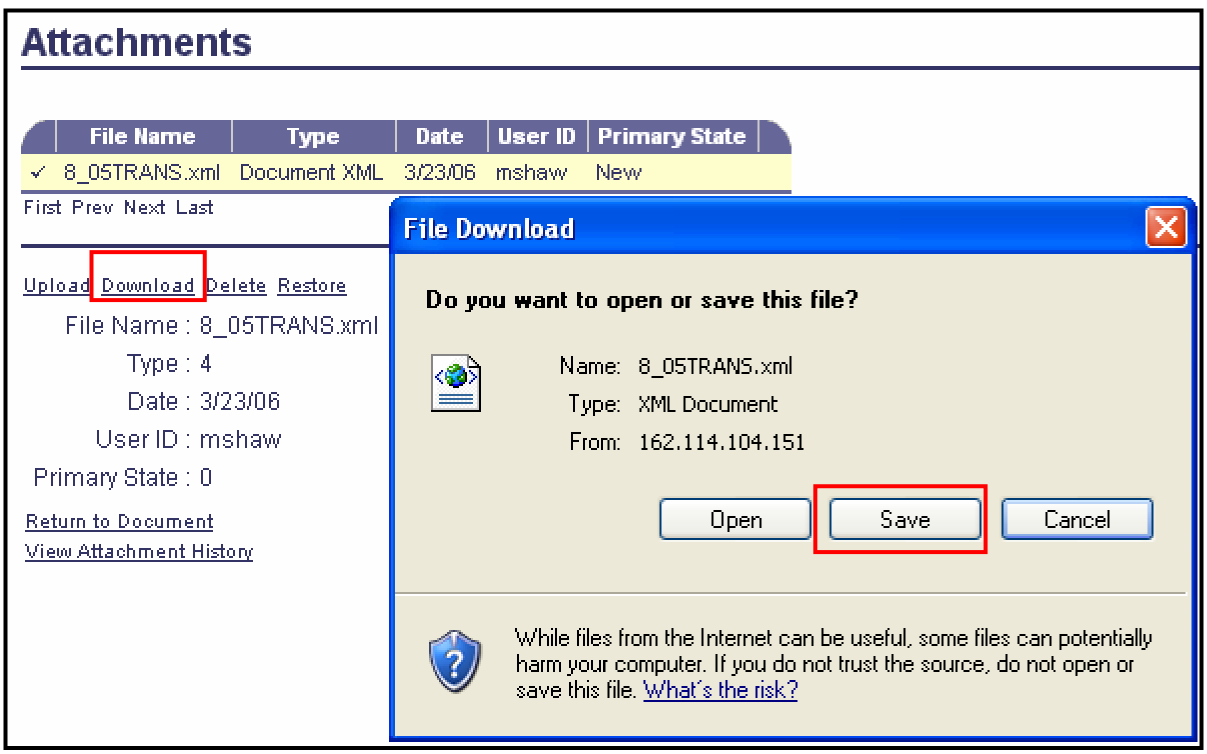


Open the **Action Menu** and click **Attachments**. This allows you to download a copy of the MS-Word document to modify.



The Attachment page opens. Click **Download**.

Click **Save** to save a copy to your local file system.



Once you have saved a local copy, open the file in MS-Word to make your changes. Make your changes and Save the file as .XML. When editing the file please observe the following rules:

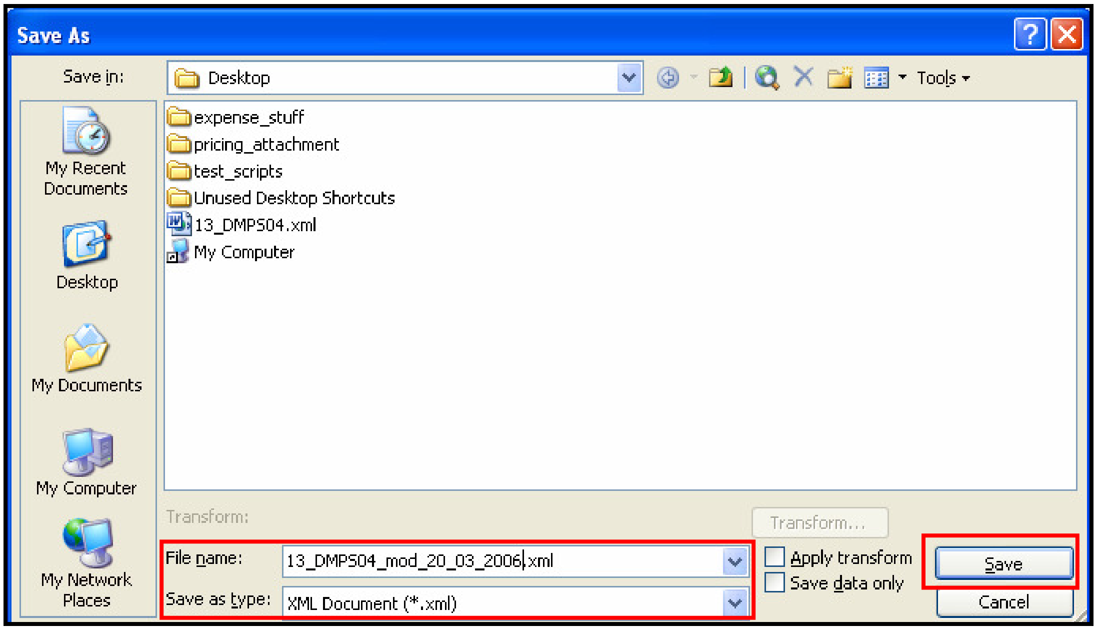
Do's:

- Do ensure you are utilizing Word 2003 before attempting to edit **T&C**.
- Do set your top margin of your Word Document to 1.5.
- Do save the document as an **.XML** file.
- Do add **Supporting Documents** when necessary. These documents must also be in .**XML** format, but they will appear below the **Terms and Conditions** when the document is assembled. If multiple attachments are used, there will be a page break between each attachment. If you insert a line accidentally, you need to delete it by using the scissor icon.
- Do use "Normal" formatting for all text.
- Do use "Grid" formatting for all tables.
- Do clear all formatting, and then reformat your bolding, bullets, and justifications if using an existing document for the first time.
- Do select the "Free" **T&C**, then delete the attached file and upload your **.XML** document. If you have inserted a link to a picture(s) in your document, you must upload the picture file(s) after you have uploaded the **.XML** file.
- Do attach any type of document, regardless of file type in the **Header** section.

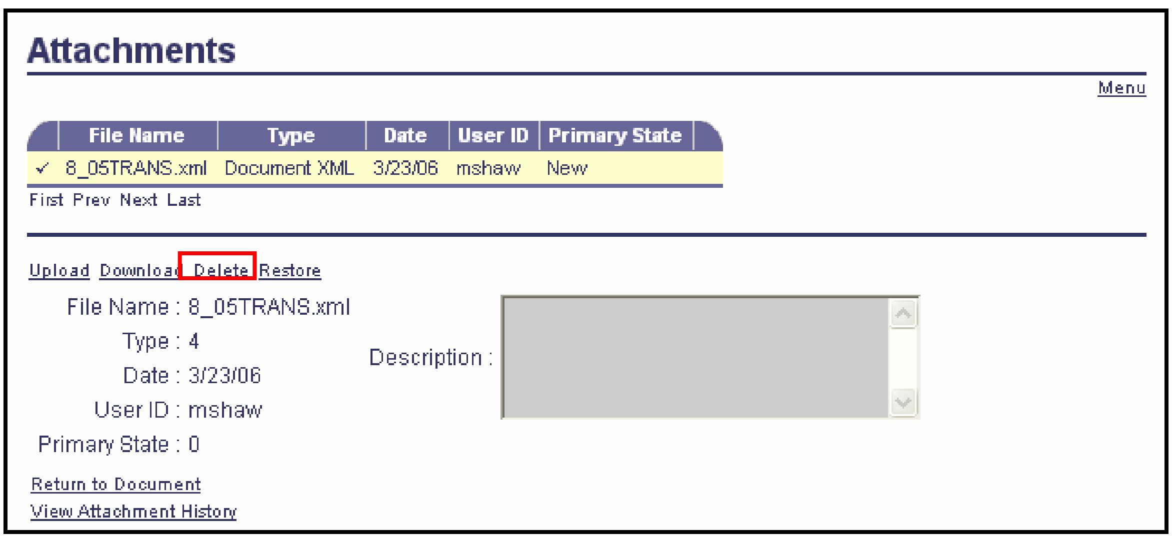
Don'ts

- Don't use Section breaks – the assembly process stops at the first section break.
- Don't use Page breaks – these are ignored in the assembly process.
- Don't use Track Changes.
- Don't add **Terms and Conditions** to the Commodity **T&Cs** section – add to the **Terms and Conditions** section only.
- Don't insert blank lines in the **Supporting Documents** section.
- Don't insert objects directly into the document.
    - If you have a picture, you must insert as a link to the file.
    - Attach any documents as **Supporting Documents** or in the document **Header** section.

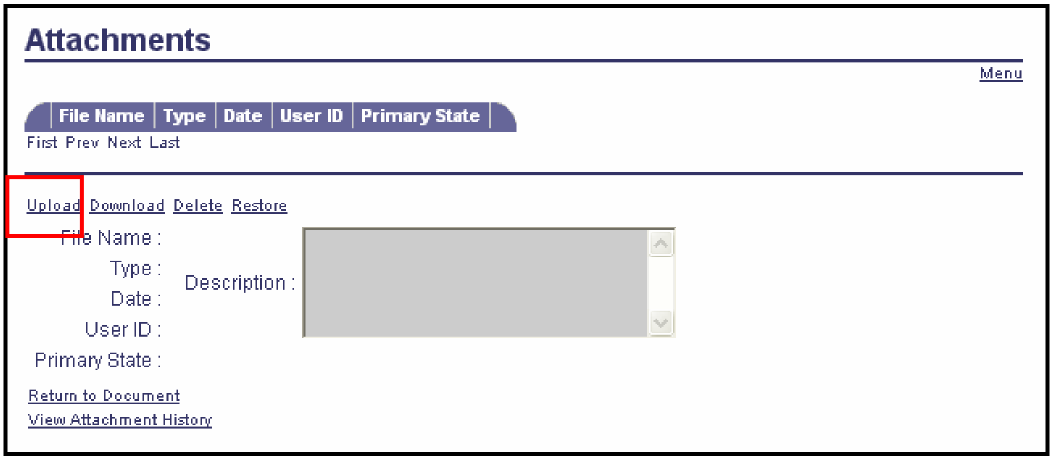
Use the MS-Word **Save as** to save the document as Word-**XML**.



Return to the Terms and Conditions record and access the **Attachment** page again through the **__Action Menu__**. Delete the previous version of the attachment by clicking on the **__Delete__** link.

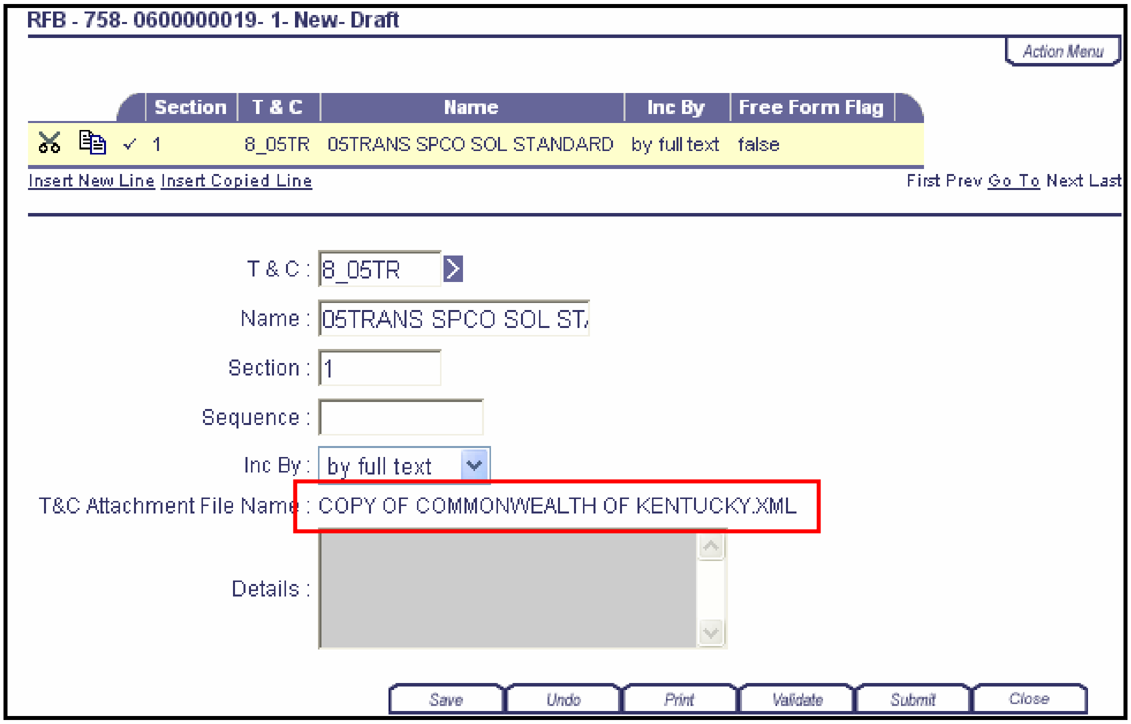


Upload the new version you created in Step 4 by clicking the **Upload** link.



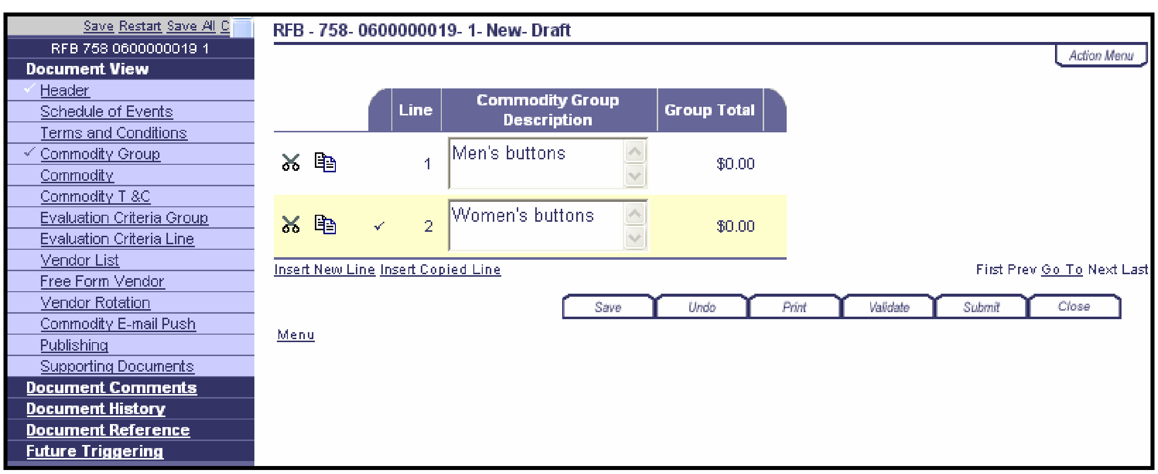
Browse your local hard files for the recently saved version of the document. Once the file has been located, click **Upload** to load the file into your document.

Once the upload has completed successfully and you return to the Solicitation document, you will notice that the **Terms and Conditions** attachment file name has changed to your new file. eMARS will use this new file in the bid package/print-out.



Step 10: If you wish to create Commodity Groups, you can do so. All Commodity Groups are used to group Commodity lines together for organizational and evaluation purposes. The evaluation document (**EV**) allows you to award at the Commodity Group level and the Evaluation Spread sheet will show the lowest bidder by commodity group. You must click **Insert New Line** to add a new group.

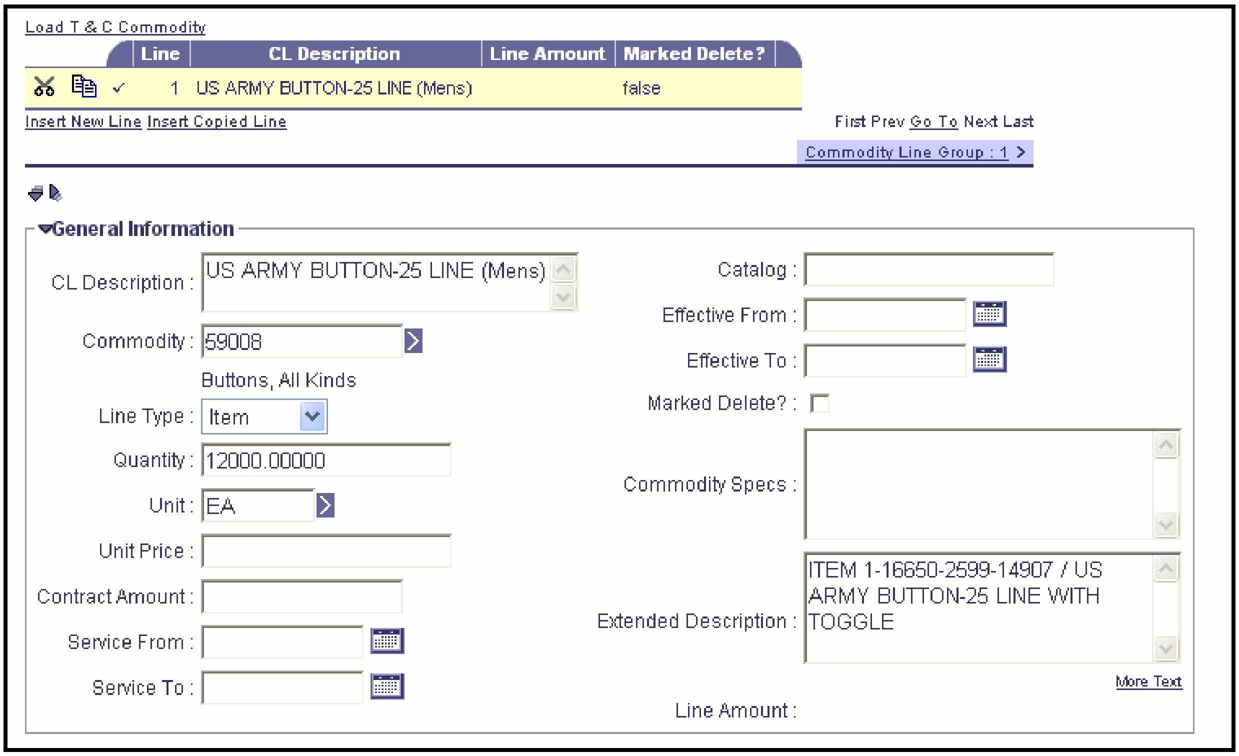
NOTE: A default group will always be created. You should edit the Commodity Group Description, even if you wish to keep your Commodity lines in a single group to be awarded as a total, or by line.



The **Commodity Group Description** field is used to record the name of the Group.

NOTE: To view the Commodity lines associated with a given commodity group you must select the Group in the Commodity Group grid section and then transition to the Commodity panel by clicking on the **Commodity** link in the Secondary navigation panel.

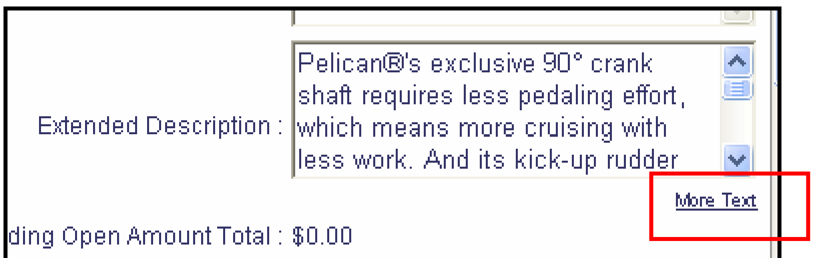
Create Commodities. The **Commodity** section of the Solicitation is used to list all distinct goods or services being requested. Complete the required fields for the **General Information** section.

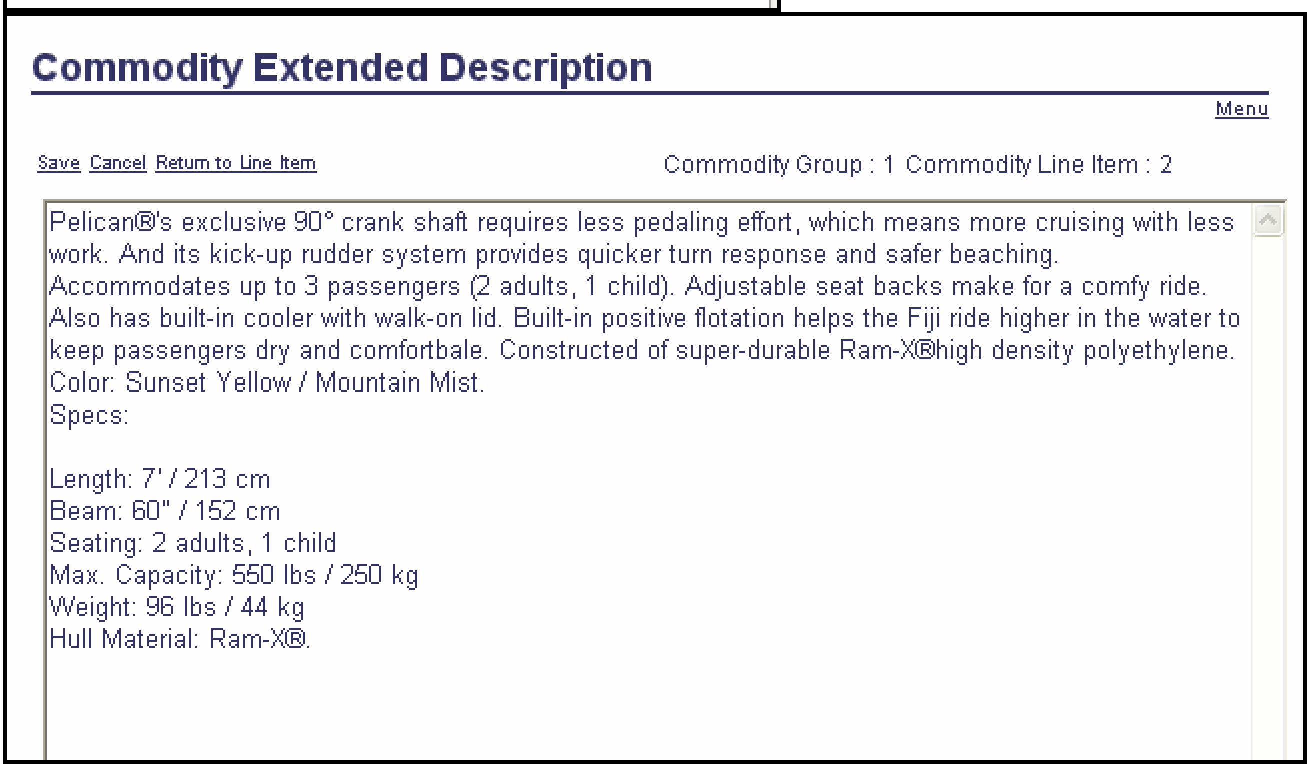


- The **CL Description** (Commodity Line Description) field should be used to record a brief description of the good or service being requested. This field does print-out on all documents and is used on subsequent Procurement Documents. This field is displayed in the grid area of the Commodity section in order to help you identify which line you would like to inspect or modify.
- The **Commodity** field is used to store the five digit NIGP commodity code that most closely matches the item or service being purchased. This field is used primarily for classification purposes. **When creating a Solicitation it is important to make the first commodity the one that is most relevant to the Solicitation as a whole. The first commodity code is used by EMARS to determine which office will receive the Solicitation for processing.**

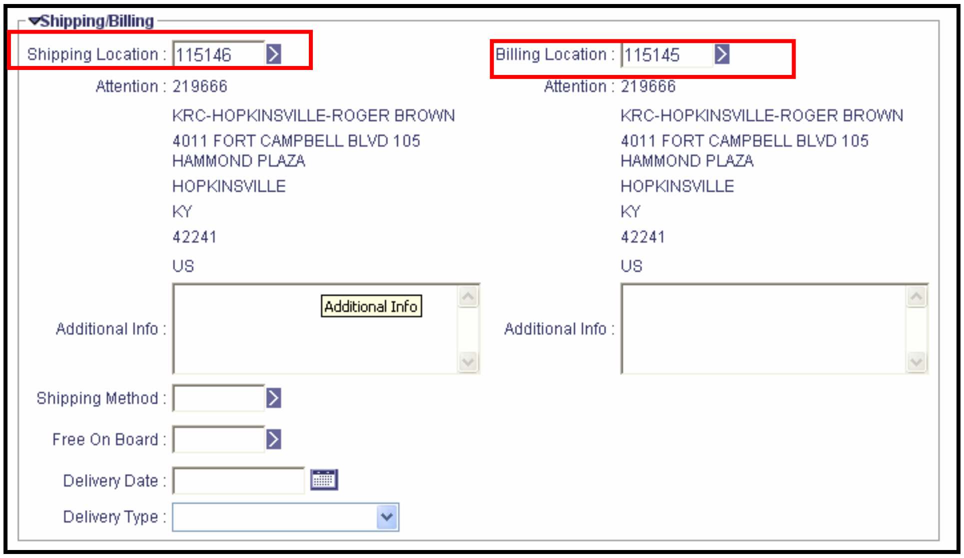
- The **Line Type** field is used to select how the cost of the line item will be established. Generally speaking, goods should be recorded with a **Quantity**, **Unit of Measure** and **Unit Price** and Services should be entered as **Contract Amount**.
    - When you know the **Unit Price** a Line Type of "**ITEM**" should be selected. The **Unit** of Measure, **Unit Price**, and **Quantity** are required.
    - If the unit cost is unknown or not applicable the lump sum cost of the line should be recorded in the **Contract Amount** field. In this case a Line Type of "**Service**" should be selected. When the Line Type is Service then the **Service From** and **Service To** dates are required. These dates are the effective dates for resultant award document.
- The **Extended Description** field should be used to provide a detailed description of the desired item or service. Up to 4000 characters of information can be stored in this field. To access a larger field in which to type the extended description click on the More Text link. Since there is no spell check or grammar check in this field, you may wish to create your extended description in a Word document and then copy and paste into the Extended Description field.

NOTE: To insert a TAB into the **Extended Description** field the user must type [Ctrl] + [Tab]. You must also use the CTRL+V keyboard shortcut to paste.





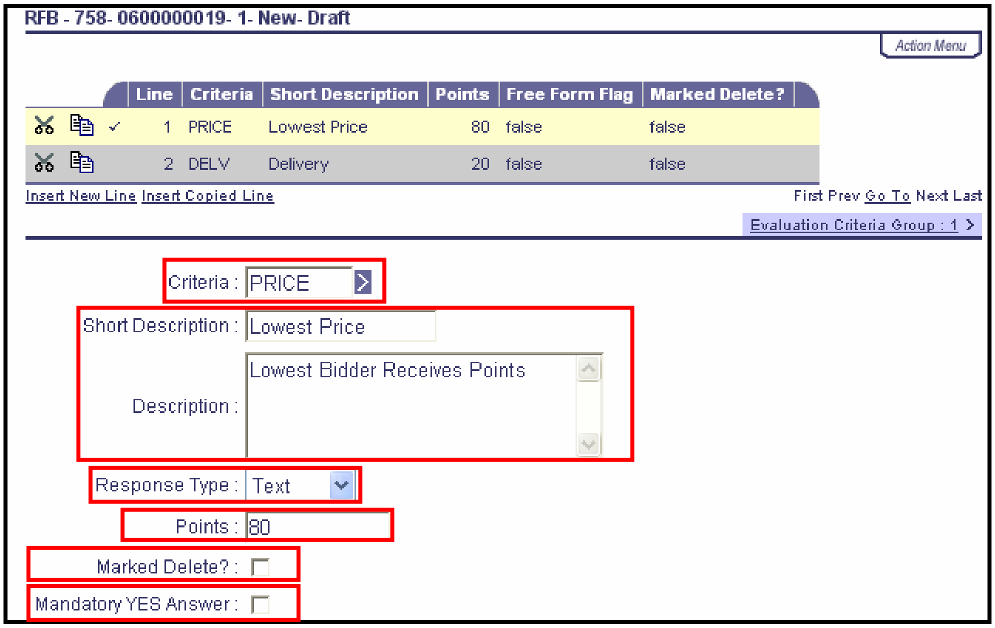
Complete the **Shipping/Billing** Information section.



- The **Shipping Location** field is used to identify where the goods should be delivered. To select a **Shipping Location** click on the **arrow** next to the **Shipping Location** field to access the **Shipping Location** pick-list. If you already know the **Shipping Location** code you may record it directly in this field without accessing the pick-list. The **Shipping Location** code, however, must be valid on the **Procurement Location** (**PLOC**) reference table.
- The **Billing Location** field is used to identify to where the Vendor's Invoice should be mailed. To select a **Billing Location** click on the **arrow** next to the **Billing Location** field to access the **Billing Location** pick-list. If you already know the **Billing Location** code you may record it directly in this field without accessing the pick-list. The **Billing Location** code, however, must be valid on the **Procurement Location** (**PLOC**) reference table.
- The **Delivery Date** field is used to enter the date by which you will need the goods being requested to be delivered.

NOTE: Do not complete the **Shipping Method**, **Free on Board, Shipping Additional Info, Billing Additional Info** and **Delivery Type** fields. These fields are not required. These fields do not print-out.

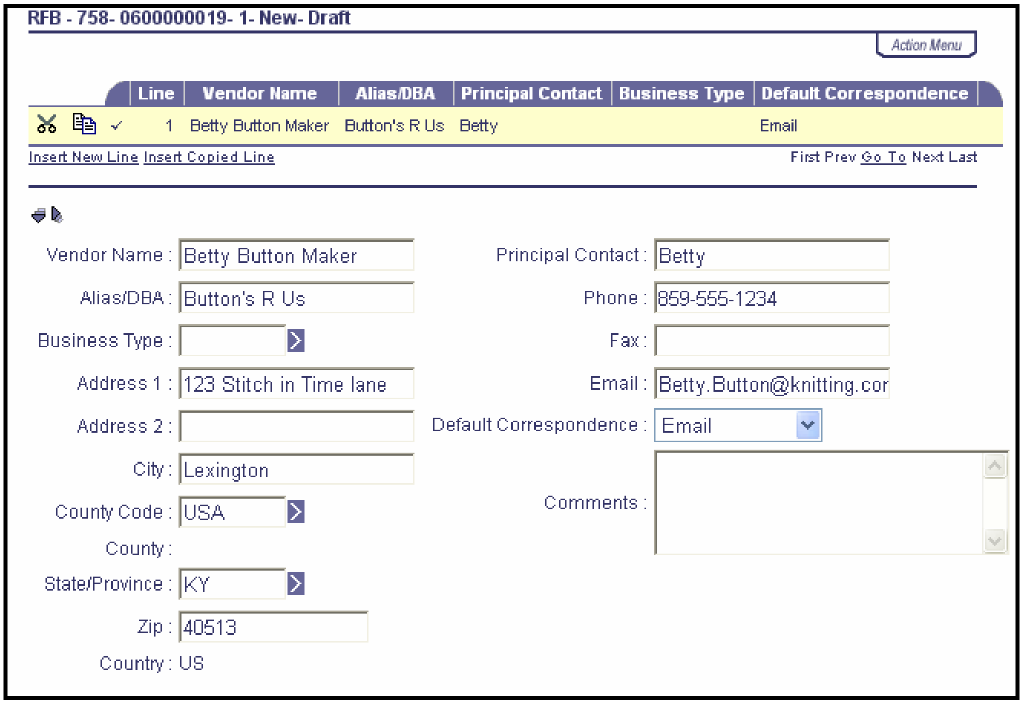
Create **Evaluation Criteria.** This section allows you to define specific considerations for evaluating responses, and applies a point value for each.



- The **Criteria** pick list allows you to select a pre-defined Evaluation Criteria from the eMARS database. If you would like to create your own Evaluation Criteria this field may be left blank.
- Use the **Short Description** / **Description** field to describe the Evaluation Criteria. These fields will be populated if a pre-defined Evaluation Criteria has been used.
- The **Response Type** field is used to determine the format of the response required from Vendors. Possible choices are: **Text**, **Number**, **Yes**/**No**, **Date**, and **None.**
- The **Points** field is used to determine how many points may be awarded to a Vendor for the Response they've provided. It is used as part of the Evaluation process to determine which vendor will receive the award.
- The **Marked Delete?** Check-box is used on Solicitation Modifications to signify that the Evaluation Criterion is no longer part of the Solicitation.
- The **Mandatory YES Answer** check-box is used to require the Vendor to answer "**Yes**" to Evaluation Criteria that have been set-up with a **Response Type** of Yes/No. Solicitation Response documents with a "No" answer to a mandatory Evaluation Criteria may not be submitted.

Create the **Free-Form Vendor** list. The **Free-Form Vendor** list is used to ensure that Vendors who are not registered in the eMARS database receive notification of this Solicitation/bid opportunity.

This is an optional step.


RFB - 758- 0600000019- 1- New- Draft

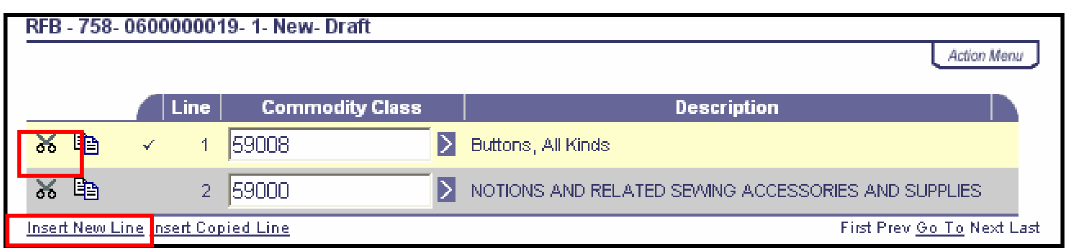
Action Menu

	Line	Vendor Name	Alias/DBA	Principal Contact	Business Type	Default Correspondence
✓	1	Betty Button Maker	Button's R Us	Betty		Email

Insert New Line Insert Copied Line — First Prev Go To Next Last

Vendor Name : Betty Button Maker
Alias/DBA : Button's R Us
Business Type :
Address 1 : 123 Stitch in Time lane
Address 2 :
City : Lexington
County Code : USA
County :
State/Province : KY
Zip : 40513
Country : US
Principal Contact : Betty
Phone : 859-555-1234
Fax :
Email : Betty.Button@knitting.cor
Default Correspondence : Email
Comments :

Inspect the **Commodity E-mail Push**. Vendors will receive automatic notification if they have registered for the Commodities listed on this component. This section is automatically populated based on the Commodity codes in the Commodity section. You may also add and delete Commodity codes as required.

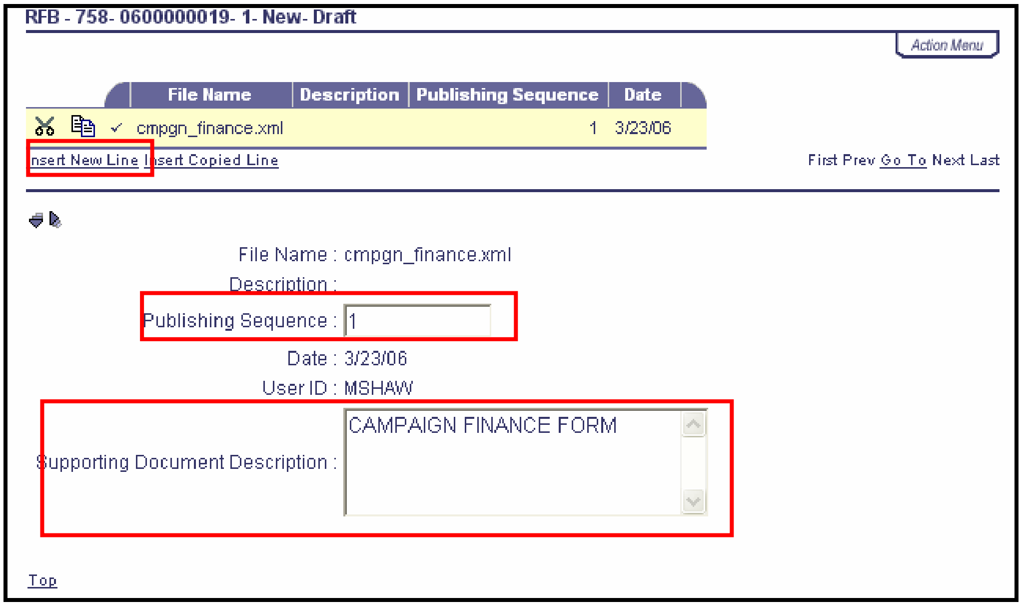

RFB - 758- 0600000019- 1- New- Draft

Action Menu

	Line	Commodity Class	Description
✓	1	59008	Buttons, All Kinds
	2	59000	NOTIONS AND RELATED SEWING ACCESSORIES AND SUPPLIES

Insert New Line Insert Copied Line — First Prev Go To Next Last

Complete the **Supporting Document** section. This section allows you to view and attach files relevant to the entire document, for example, a Statement of Work or other supporting documents. Documents in the Supporting Document section will be included in the Assembled Solicitation document. Documents in this section must be in **MS-Word XML** format. **Supporting Documents** will be placed in the Bid Package after all Terms and Conditions. Supporting Documents will be ordered within the package by the Publishing Sequence number field.

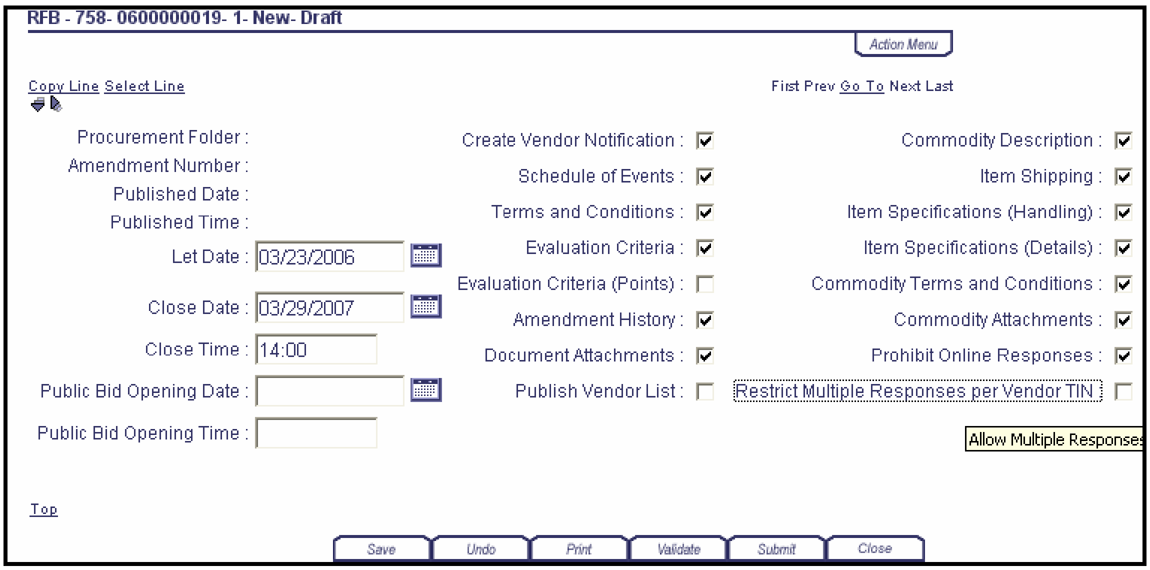


- The **Publishing Sequence** field is a numeric value which allows you to establish the display order for the attachments on the assembled Adobe Acrobat .PDF file. This field is required. When the document is validated, the system performs data validation to ensure that the Sequence value is an integer and that it has not been duplicated on other records.

- The **Supporting Document Description** field is used to describe the nature of the attached document. This value does not print and is for reference only.

Complete the **Publishing** Section. The Publishing Section is where you establish the Close Date and Close Time; whether or not to allow on-line bidding; and what elements will appear in the Vendor Self Service (**VSS**) rendering of the Solicitation.

NOTE: The Prohibit Online Responses defaults to unchecked, thereby allowing online bidding. If you will not be permitting online bidding, you must select this box. If left unselected, and a vendor submits a response, you will be unable to later select the box to disallow online bidding.



- The **Let Date** is the day the Solicitation is to be published. (Required)
- The **Close Date** is the date after which Bids/Responses will no longer be accepted from Vendors.(Required)
- The **Close Time** is the Time on the Close Date after which Rids/Quotes/Responses will no longer be accepted from Vendors. (Required)

NOTE: The Closing Time must be supplied in 24hr military time (e.g. 9:30 am =09:30, 2:00 pm =14:00).

- Public Bid Opening Date/Time: These fields may be used to specify the time at which bids will be read to the general public. (Optional) Time must be supplied in 24hr military time.
- If the **Prohibit Online Responses** flag is not selected, then online responses via **VSS** are allowed. All Solicitations, regardless of the **Prohibit Online Responses** field setting, will be posted to **VSS** when the AMS EMARS Financial/VSS Synchronization process is run.

NOTE**:** On Solicitation Modifications: Once a Solicitation has been finalized, the Buyer can allow online responses to that Solicitation if they were originally prohibited but the Buyer cannot prohibit online responses to that Solicitation if they were originally allowed.

- If **Restrict Multiple Responses per Vendor TIN** flag is selected, then only one response per Vendor **TIN** is allowed. If this flag is not selected, then more than one response per Vendor Taxpayer Identification Number (**TIN**) is allowed. This flag applies to responses entered through Vendor Self Service (**VSS**) and the Solicitation Response (**SR**) document in EMARS.

NOTE: This flag cannot be changed during a modification of a submitted solicitation document.

Click **Validate** to check for errors.

To Assemble:

1. From the **Header** Section click on **Assemble Document**
2. Click **Submit Assemble Request**
3. Click on **Refresh**, You should see the status as Successful (You may have to click refresh a few times before the assembly job finishes and you see a Successful Status).
4. Click **Back** to return to the document

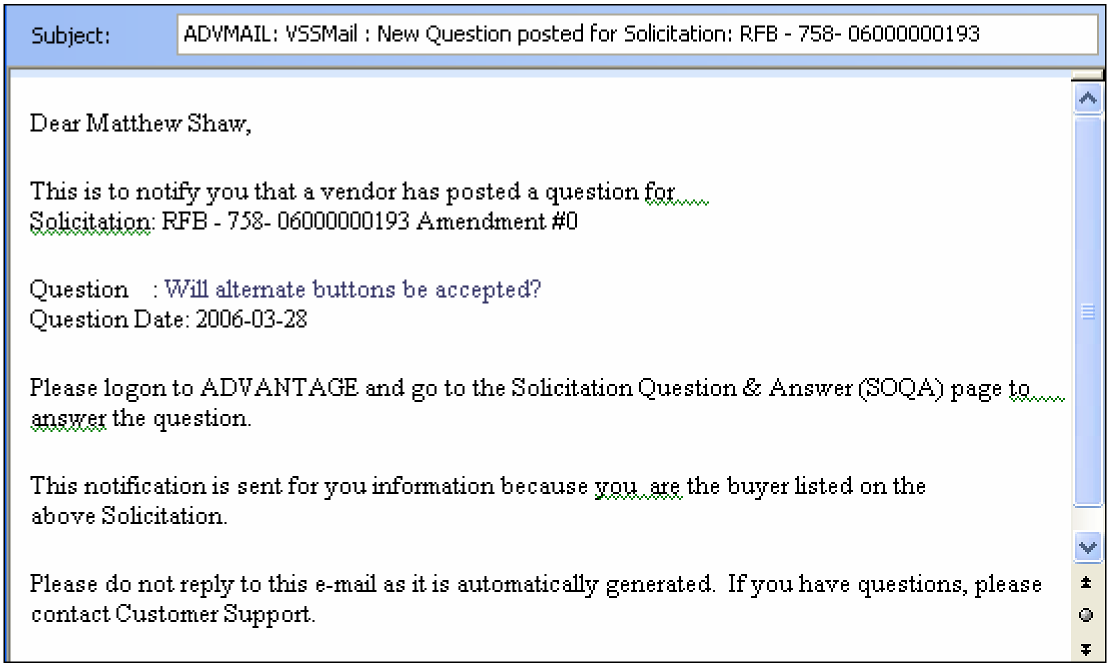
To Print the Assembled Form:

1. Return to **Header**
2. From the **Action Menu**, select **Attachments**.
3. Click **Download**.
4. While the **PDF** document is open use the **File Menu** Options to either print or email the document.

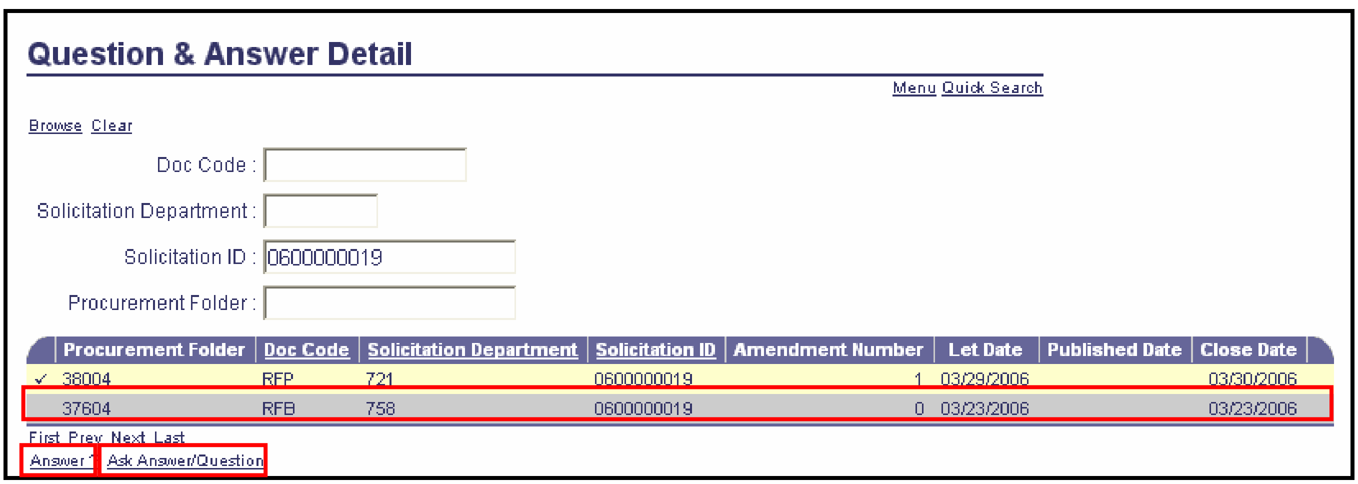
Submit the document to initiate workflow for approval.

There are additional steps during the Solicitation Response phase:

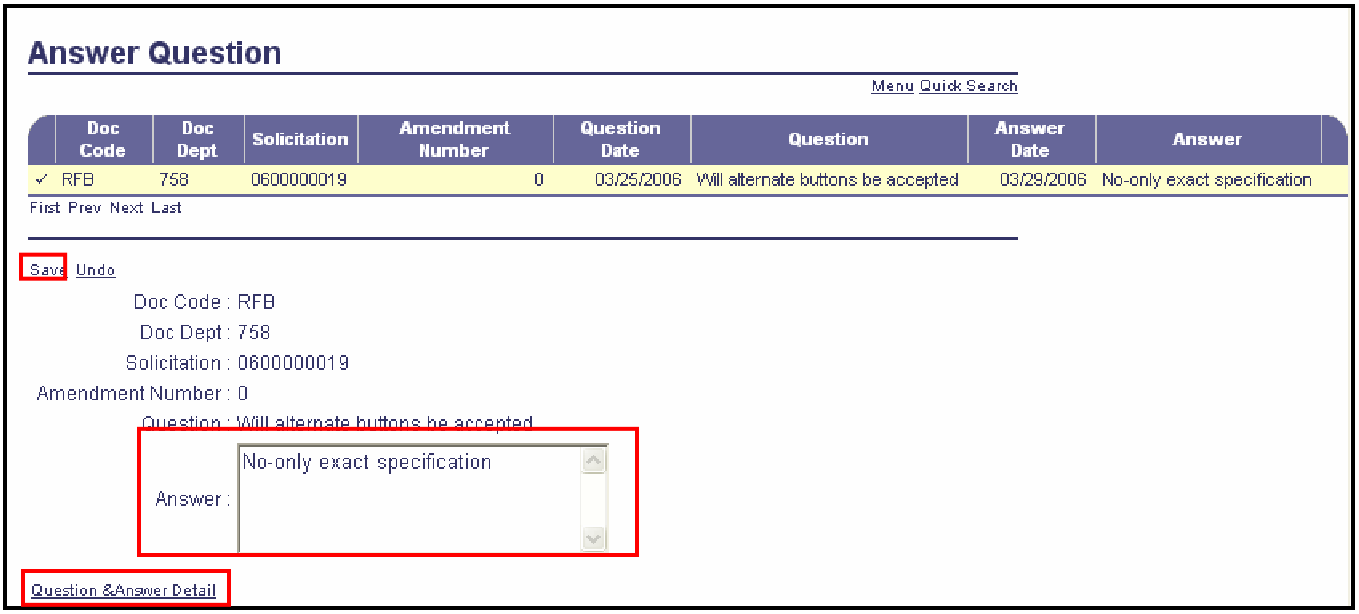
Post/Monitor Questions that are submitted through Kentucky Vendor Self Service (**VSS**). When the Solicitation is posted to **VSS**, Vendors have the ability to ask questions about the Solicitation that will be automatically routed to you via e-mail.



When you receive the e-mail you must access the **Solicitation Question and Answers** (**SOQA**) table from Page Search. The e-mail will go the buyer e-mail address and will appear in your regular Outlook mail. Search for the Solicitation by entering the **Doc Code**, **Solicitation Department** and **Solicitation ID** and clicking **Browse**. Select the row from the grid section that corresponds to your Solicitation and click the **Answer** link to respond to a vendor's question. To post a Question and Answer received Off-line (FAX, phone) select the row in the grid and click the **Ask Answer /Question** link.



Click the **Answer** link to transition to the Answer page where you may respond to Questions submitted through **VSS**.

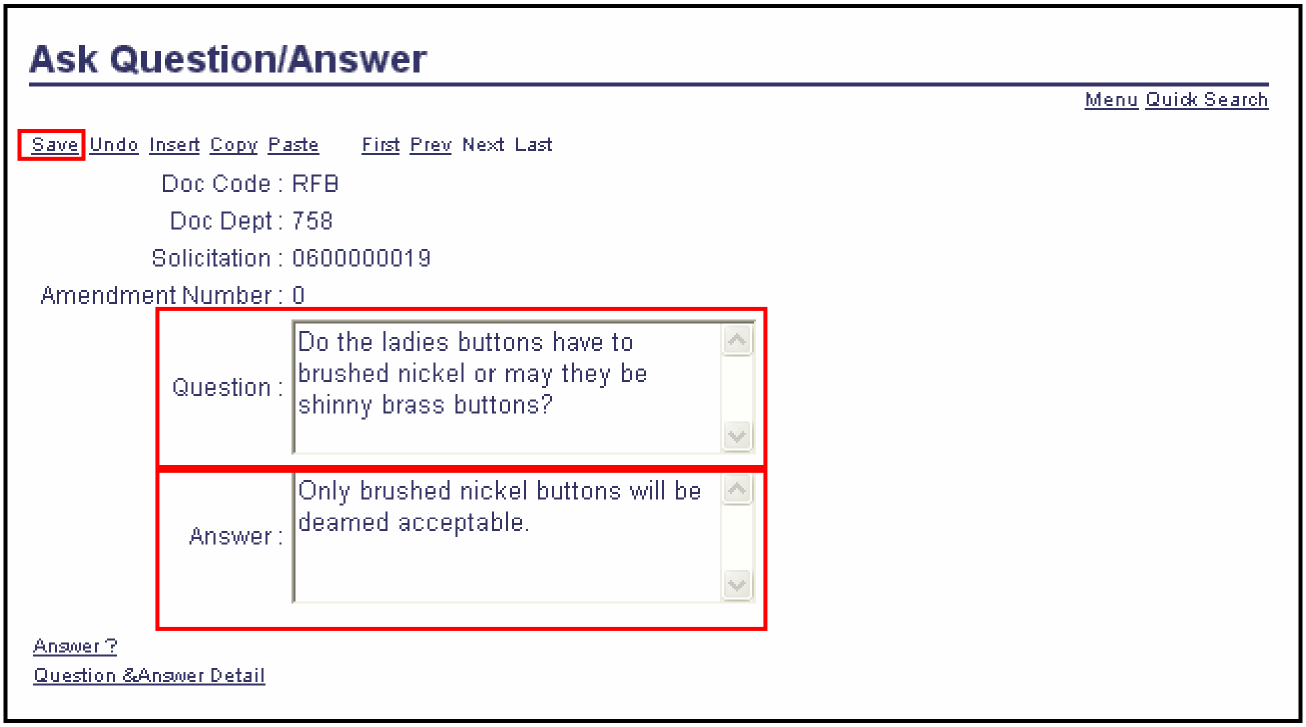


- Enter your answer to the vendor's question in the **Answer** field. You may enter up-to 250 characters of text.

NOTE: Your answer will become part of the public record and will be posted to the internet! Please consider typing your answer into MS-Word for spell check and then copying the text into the **Answer** field.

- Clicking the **Question & Answer Detail** link will transition you back to the first page where you selected the Solicitation.

Post a Question and Answer received through other means: e-mail, phone, FAX etc. From the **Question and Answer Detail** page search for and select the Solicitation for which you wish to post a Question and Answer and click the **<u>Ask/Answer Question</u>** link.



- The **Question** field allows you to enter the question received from the Vendor. Please enter the Question exactly as received from the Vendor.
- Enter your answer to the vendor's question in the **Answer** field. You may enter up-to 250 characters of text.

NOTE: Your answer will become part of the public record and will be posted to the internet! Please consider typing your answer into MS-Word for spell check and then copying the text into the **Answer** field.

- Click **<u>Save</u>** to post your response to **VSS**. It will be available for the public after the next **VSS** synchronization.

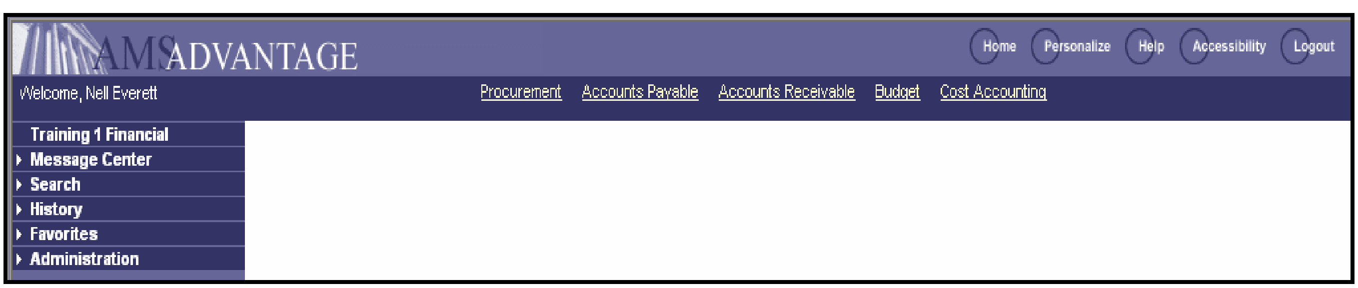
Exercises – Logging In to eMARS

You will use a Student ID to access the training database during class. These IDs are only set up for the training environment. Your User ID for the production environment will be assigned along with a new password when eMARS is implemented.

From the Login page, enter the following information:

Required Fields	Values
User Name	Enter your Student ID posted on your Student Card. **NOTE: User Names are case sensitive.**
Password	Enter your Password and click **Login**. **NOTE: Passwords are case sensitive.**

The Home Page appears.



Exercise 1 – Create a Solicitation document from your Procurement Workspace

Scenario

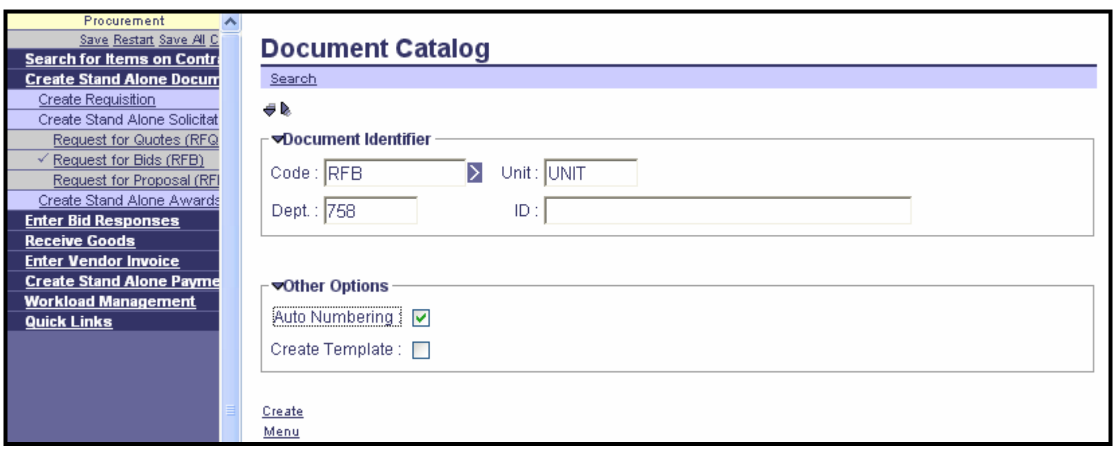
You need to initiate a Competitive Bidding Process for Replacement Buttons for the Dress Uniforms for Kentucky's National Guard.

Task Overview

You will create an **RFB** from your **Procurement Workspace**. On the **RFB** you will add custom **Terms and Conditions**, build a **Vendor List**, build a list of the **Commodities** being solicited and set the Publishing Dates.

Procedures

1. Access your **Procurement Workspace** and click **Create Standalone Document** in the Secondary Navigation Panel.
2. Expand the **Create Standalone Solicitation** section. Click **Request For Bids (RFB)**. The Document catalog opens.
3. Click **Create**.

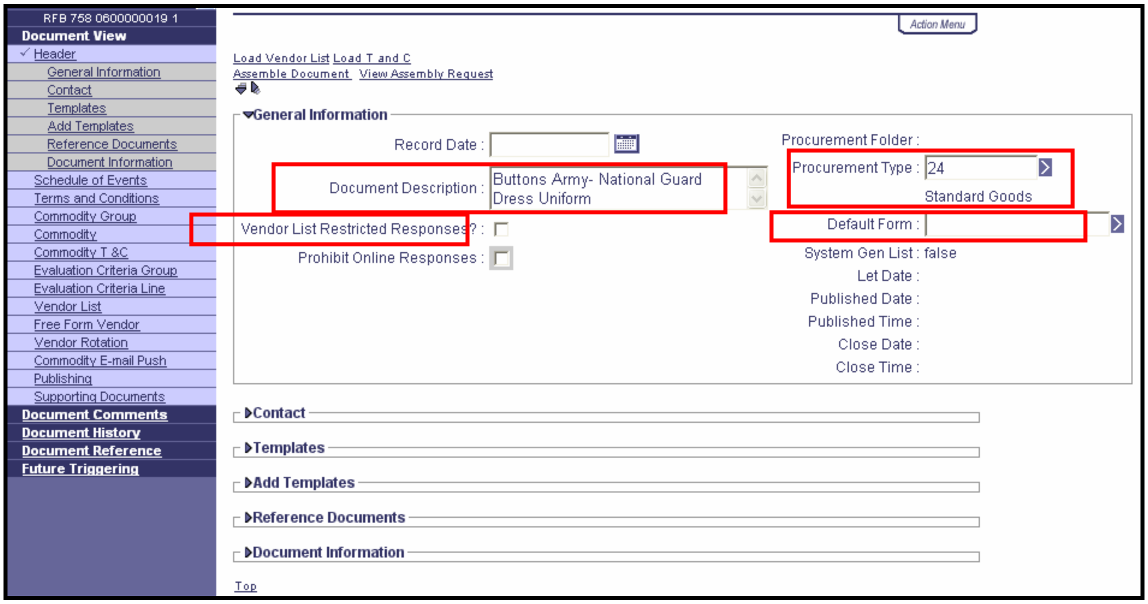


4. Enter the following information:

Required Fields	Values
Code	RFB
Dept	See Student Card
Unit	UNIT

5. Click **Auto Numbering**.

6. Click **Create**. The document opens to the **Header** page.
7. Complete the required fields in the Solicitation document header.

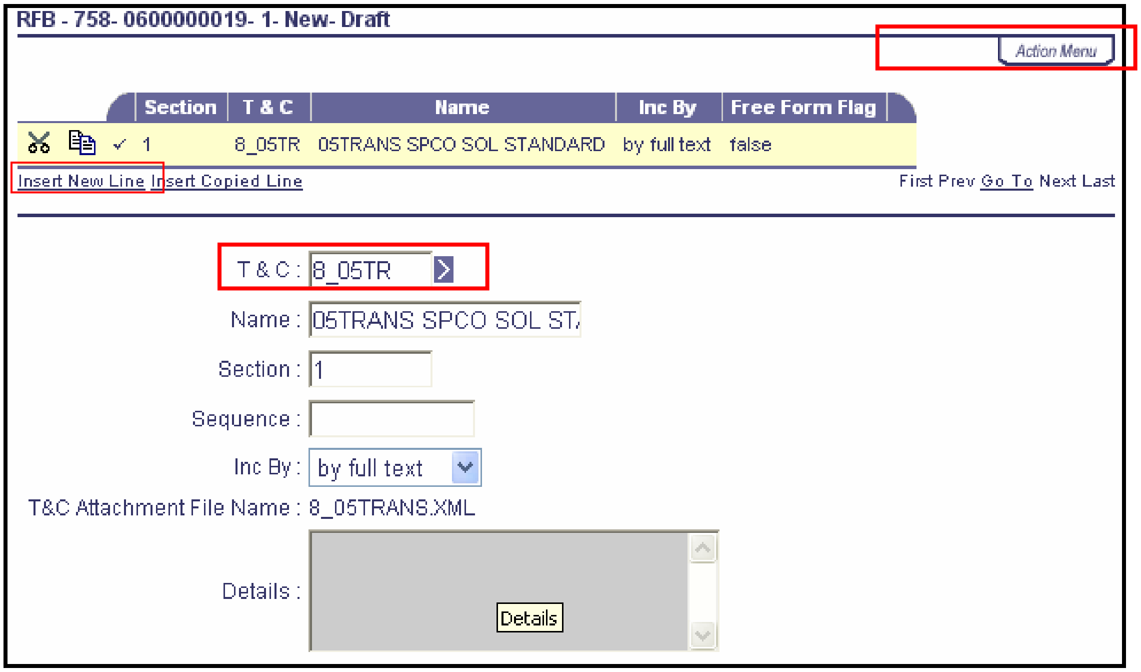


Required Fields	Values
Document Description	Buttons Army –National Guard Dress Uniform
Procurement Type ID	24
Vendor List Restricted Responses	Leave this box unselected
Default Form	Leave blank

8. Complete the **Contact** Section

Required Fields	Values
Issuer ID	Defaults to your ID. Leave as is
Requestor ID	Select your User-ID

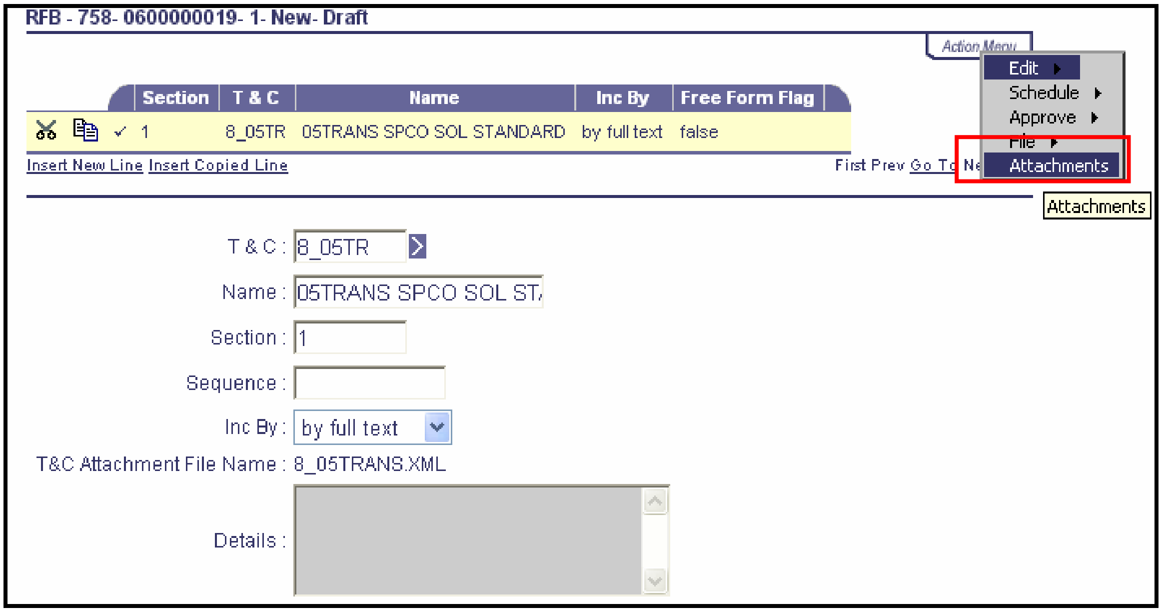
9. Complete the **Terms and Conditions** component. Click on **Terms and Conditions** in the Secondary Navigation Panel.
10. Click **Insert New Line** to add **Terms and Conditions**.



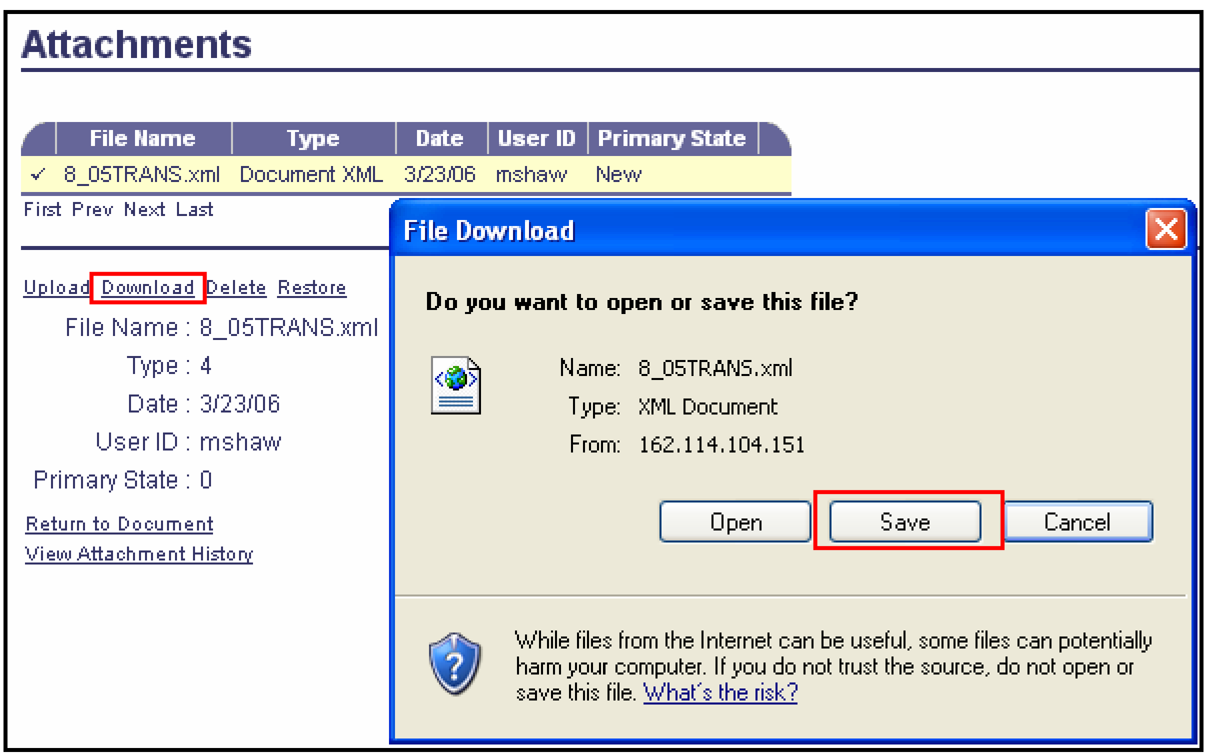
Required Fields	**Values**
T&C	**Select: 8_05TR from the Pick list**

11. Click **Save** to pull in the Terms &Conditions information.

12. From the **Action Menu** click on the **Attachments** link. This will allow you to Download a copy of the MS-Word document for you to modify.



13. The **Attachment** page will open.
14. Click on the **Download** link and then on **Save** link to save a copy to your local workstation desktop.



15. Once you have saved a local copy, open the file in MS-Word and make your changes. Save the file as .XML.

When editing the file please observe the following rules:

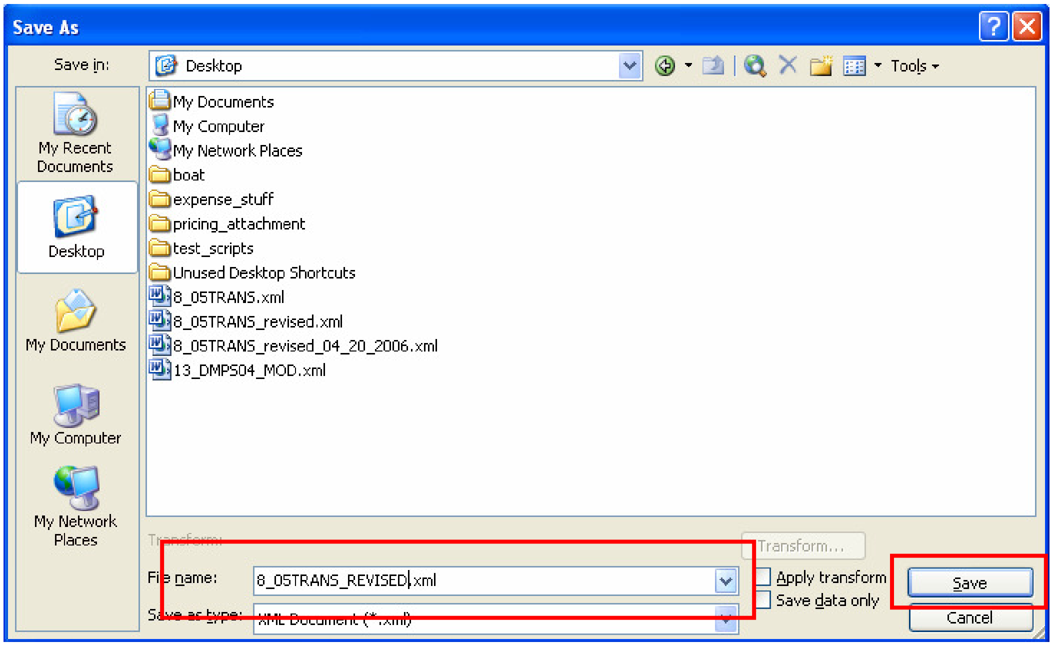
Do's:

- Do ensure you are utilizing Word 2003 before attempting to edit **T&C**.
- Do set your top margin of your Word Document to 1.5.
- Do save the document as an **.XML** file.
- Do add **Supporting Documents** when necessary. These documents must also be in .**XML** format, but they will appear below the **Terms and Conditions** when the document is assembled. If multiple attachments are used, there will be a page break between each attachment. If you insert a line accidentally, you need to delete it by using the scissor icon.
- Do use "Normal" formatting for all text.
- Do use "Grid" formatting for all tables.
- Do clear all formatting, and then reformat your bolding, bullets, and justifications if using an existing document for the first time.
- Do select the "Free" **T&C**, then delete the attached file and upload your .**XML** document. If you have inserted a link to a picture(s) in your document, you must upload the picture file(s) after you have uploaded the **.XML** file.
- Do attach any type of document, regardless of file type in the **Header** section.

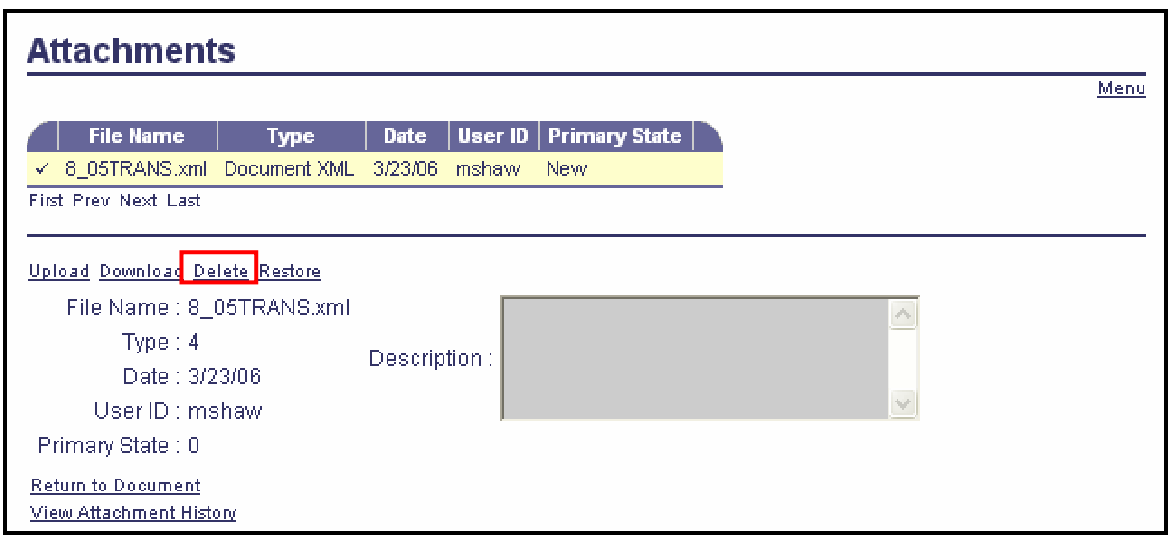
Don'ts

- Don't use Section breaks – the assembly process stops at the first section break.
- Don't use Page breaks – these are ignored in the assembly process.
- Don't use Track Changes.
- Don't add **Terms and Conditions** to the Commodity **T&Cs** section – add to the **Terms and Conditions** section only.
- Don't insert blank lines in the **Supporting Documents** section.
- Don't insert objects directly into the document.
    - If you have a picture, you must insert as a link to the file.
    - Attach any documents as **Supporting Documents** or in the document **Header** section.

16. Use **Save As** to save the document as Word-XML. Change the name of the file to **8_05TRANS_REVISED.xml**



17. Return to the Attachments Page. Delete the previous version of the attachment by clicking the **Delete** link.



18. Upload the new version you created in Step 15 by clicking on the **Upload** link**.**

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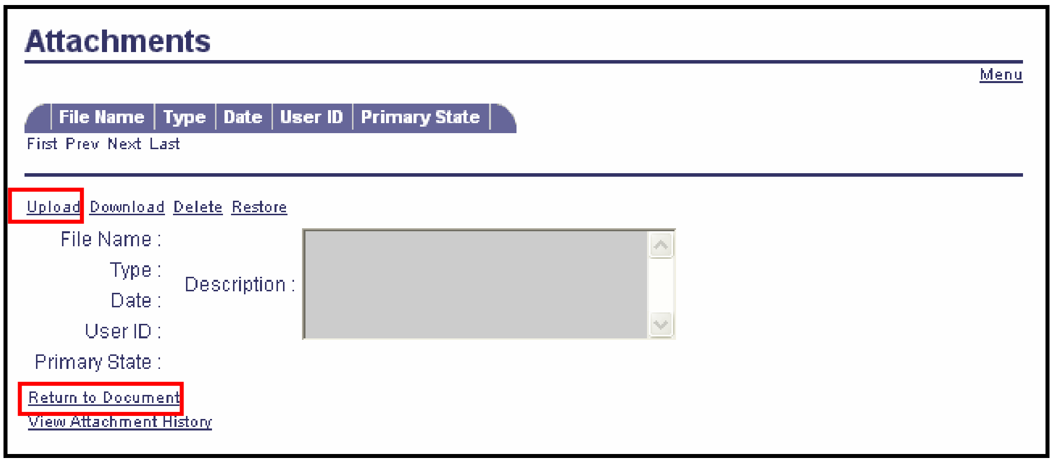
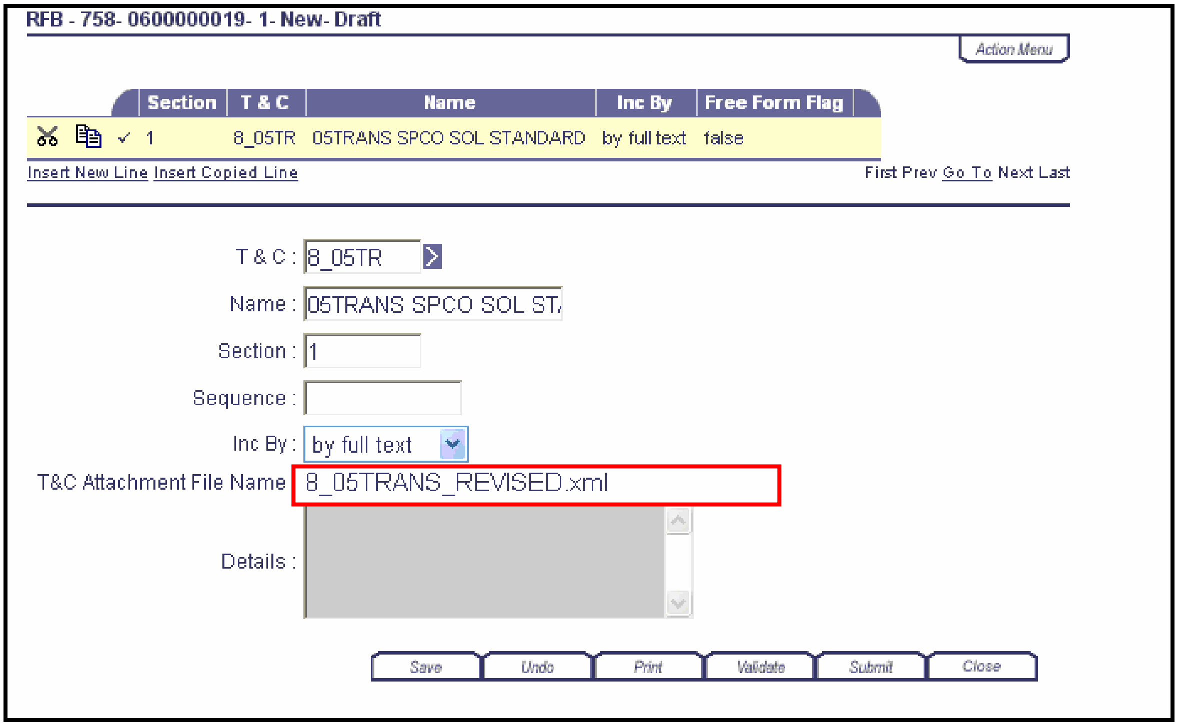


19. The Upload Attachment page will open. Click **Browse** to find and select the file. You may enter a document description for the file (Optional)

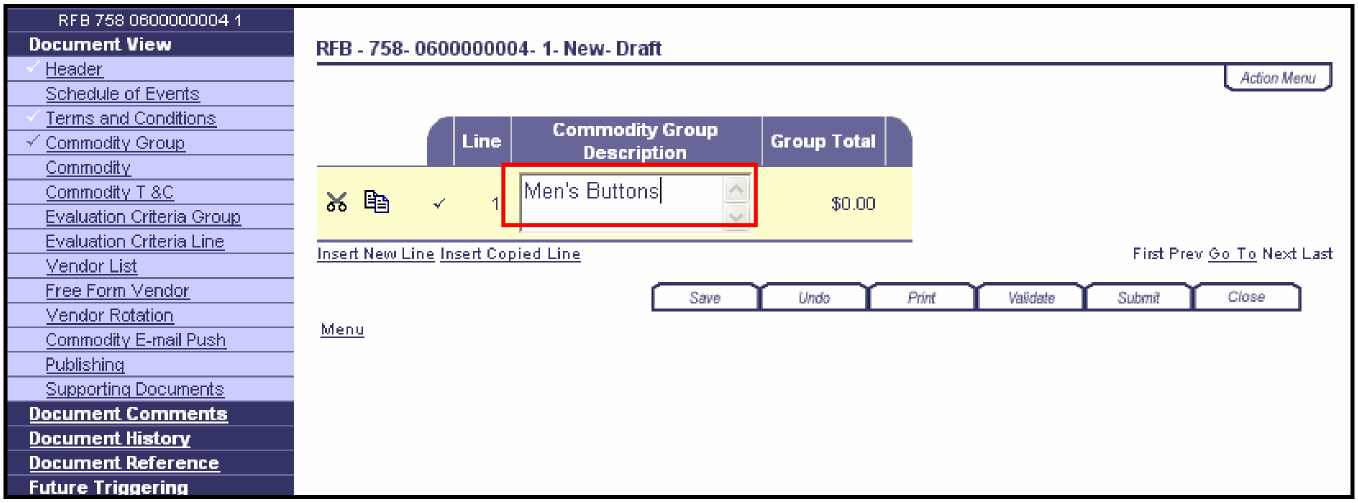
20. Click the **Upload** link. After the file is uploaded you are returned to the **Attachment** page.

21. Click the **Return To Document** link to return to the **Terms and Conditions** section of the **RFP** document. Notice that the **Terms and Conditions** Attachment file name has changed to your new file. This new file will be used in the bid package/print-out.



22. Create **Commodity Group(s).** Click on **Commodity Groups** in the Secondary Navigation Panel.

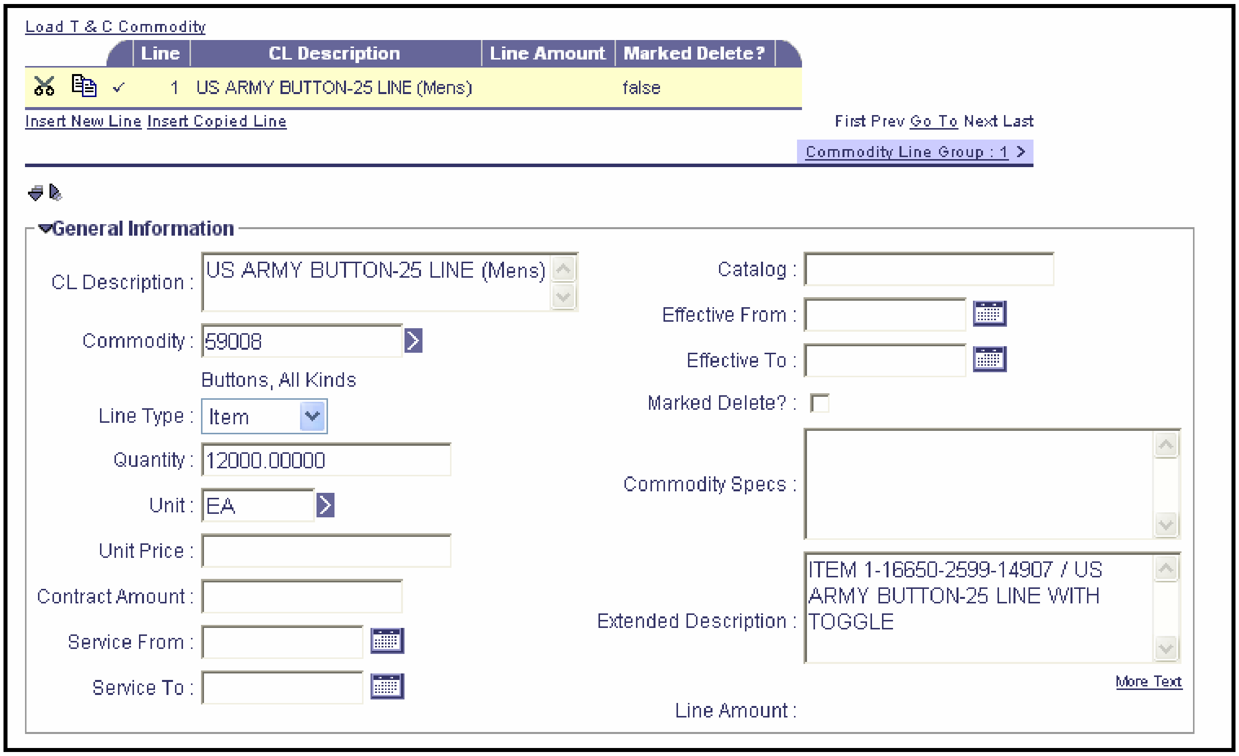
NOTE: A default group is always created



23. For a single **Commodity Group**, change the **Commodity Group Description** to "**MEN'S BUTTONS**"

24. Click on the **Commodity** link in the Secondary Navigation Panel to change the Commodities associated with the **Commodity Group**. The **Commodity** section opens.

25. Click **Insert New Line** and Complete the required fields for the **General Information** Section.



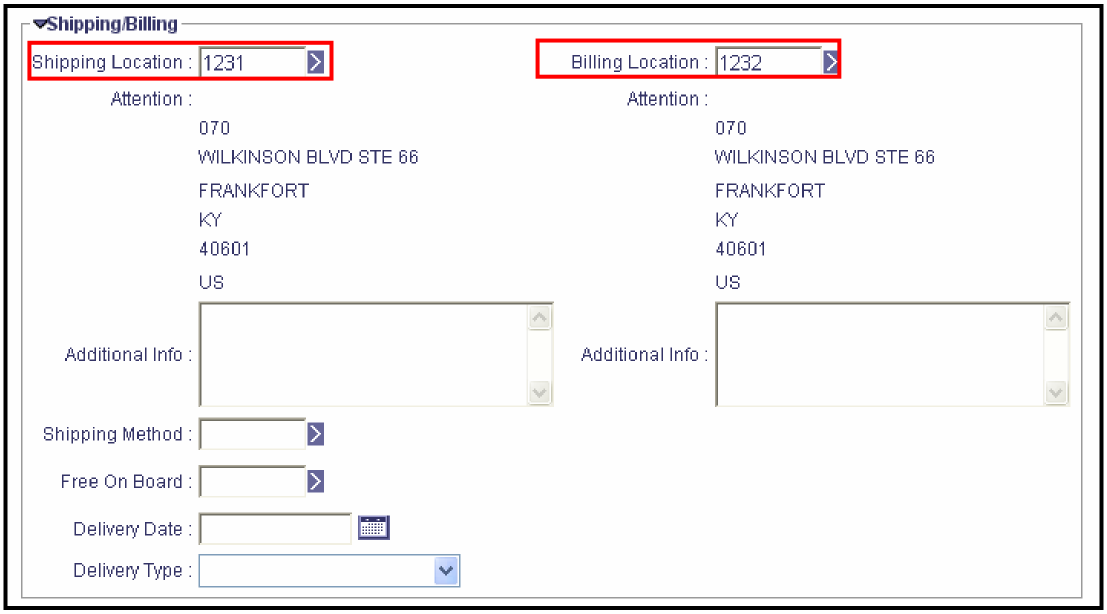
Required Fields	Values
CL Description	**US Army Button – 25 Line (Men's).**
Commodity	**59008**
Line Type	**Item**
Quantity	**1200** (Required when Line Type is Item)
Unit	**EA**
Contract Amount	**Leave blank.**
Service From	**Leave Blank.** (Required when the Line Type is "Service").
Service To	**Leave Blank.** (Required when the Line Type is "Service").
Extended Description	Enter**: US Army Button - 25 Line (Men's). Antique polished Brass with military insignia.**

26. Enter an **Extended Description**. Click on the **More Text** link to display a larger Extended Description window. Enter the following additional text:

"Antique polished Brass with military insignia"

27. Click the **Return to Line Item** link.

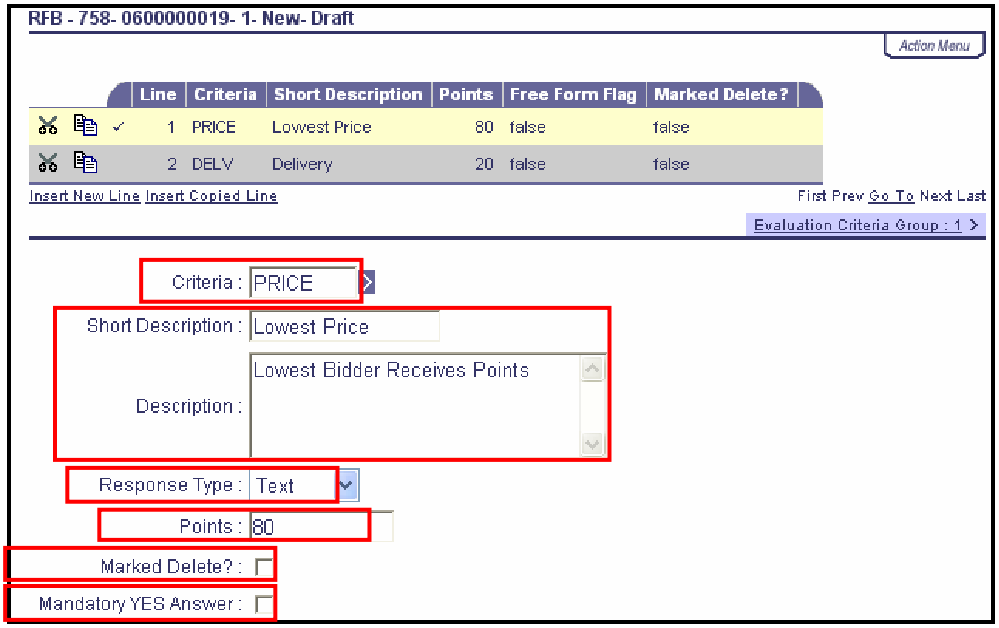
28. Complete the **Shipping/Billing** Information.



Enter the following:

Required Fields	**Values**
Shipping Location	Select **1231** from the Pick List
Billing Location	Select **1232** from the Pick List
Delivery Date	Enter 1 week from today's date
Shipping Method	Not required. Does not print-out.
Free on Board	Not required. Does not print-out.
Delivery Type	Not required. Does not print-out.

29. Create **Evaluation Criteria Line.** Click **Evaluation Criteria Line** in the Secondary Navigation Panel. This section allows you to define specific considerations for evaluating responses and applies a point value for each. You will create two Evaluation Criteria in this example: Price and Delivery.



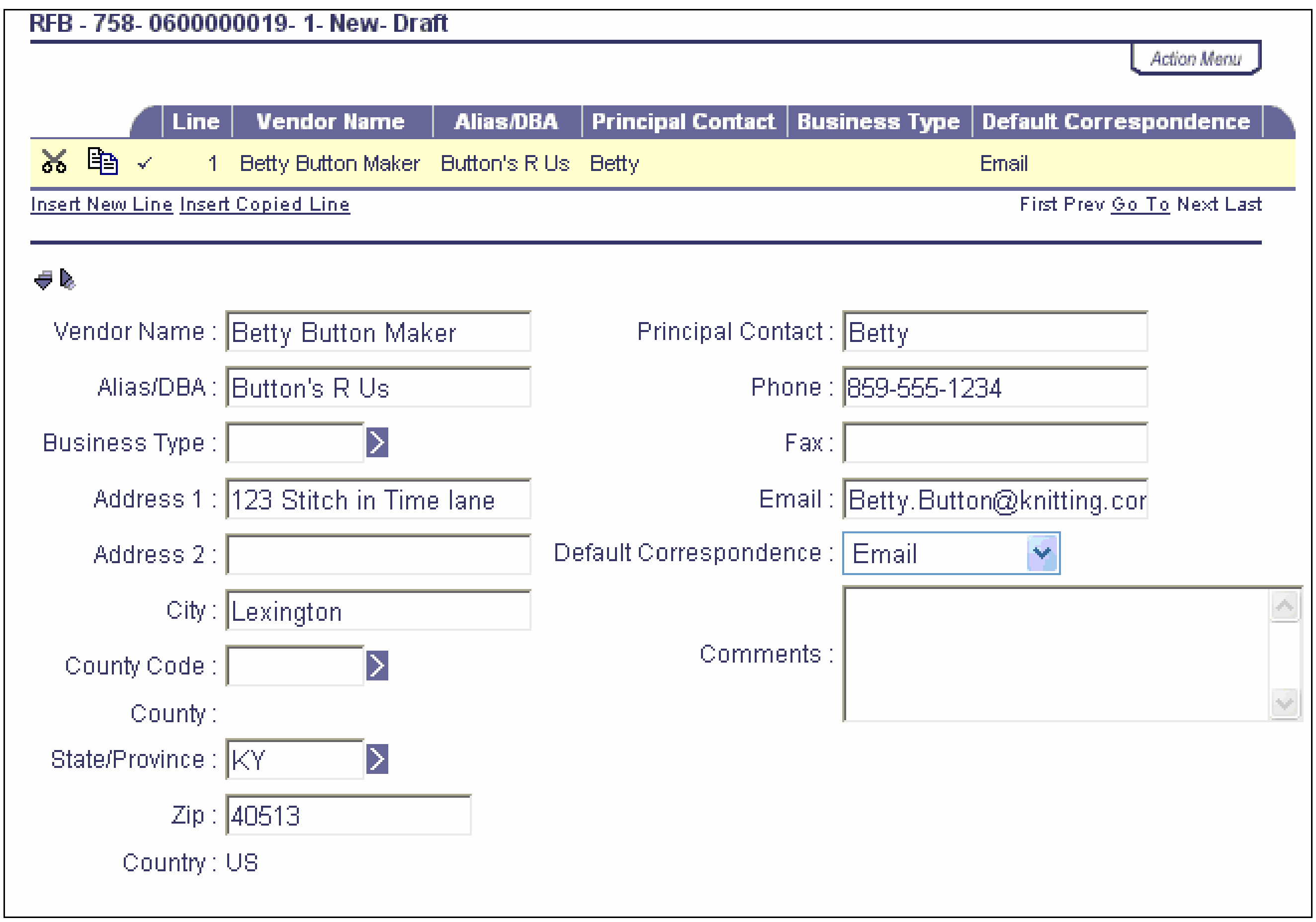
30. Click **Insert New Line** to enter the first **Evaluation Criteria**.

Required Fields	**Values**
Criteria	Select "**Price**" from the pick list for the first criteria
Short Description / Description	Used to briefly describe the Evaluation Criteria being entered. This field will be populated if a pre-defined Evaluation Criteria has been selected from the pick list. **Leave as defaulted**
Response Type	Select "**Text**"
Points	Used to determine how many points may be awarded to a Vendor for the responses they've provided. It is used as part of the Evaluation process to determine which vendor will receive the award. Enter"**50**"
Marked Delete?	Leave blank
Mandatory YES Answer	Leave blank

31. Click **Insert New Line** to enter the second **Evaluation Criteria**

Required Fields	Values
Criteria	Select “**DELV**” from the pick list for the first criteria
Short Description / Description	Used to briefly describe the Evaluation Criteria being entered. This field will be populated if a pre-defined Evaluation Criteria has been selected from the pick list. **Leave as defaulted**
Response Type	Select “**Text**”
Points	Used to determine how many points may be awarded to a Vendor for the responses they’ve provided. It is used as part of the Evaluation process to determine which vendor will receive the award. Enter”**50**”
Marked Delete?	Leave blank
Mandatory YES Answer	Leave blank

35. Create the **Free-Form Vendor** list. Select **Free Form Vendor** from the Secondary Navigation Panel.

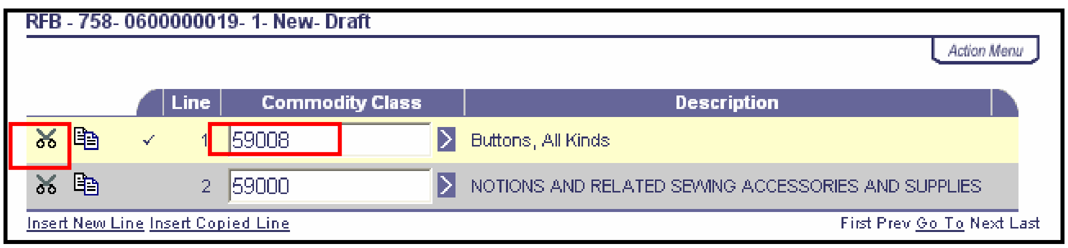


36. Click **Insert New Line** and enter the following required fields:

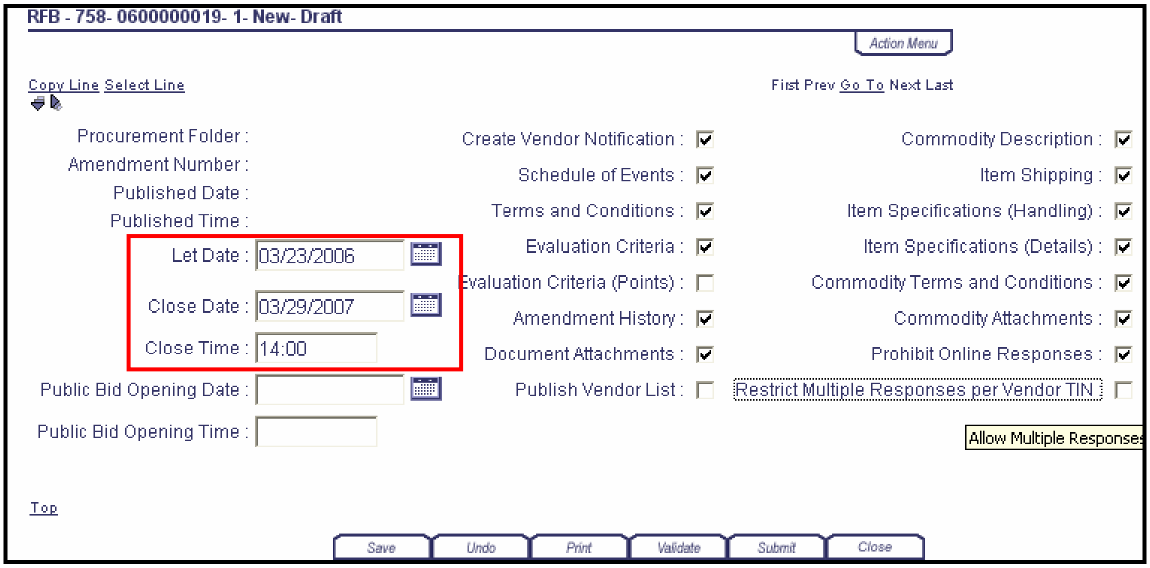
Required Fields	Values
Vendor Name	Enter **Betty Button Maker**
Address 1	Enter **123 Stitch In Time Lane**
City	Enter **Lexington**
State/Province	Enter **KY**
Zip	Enter **40513**
Principal Contact	Enter **Betty Button**
Email	Enter **Betty.Button@knitting.com**
Default Correspondence	Enter Select **Email**

37. Click **Validate**, but expect errors. You are Validating so the **Commodity E-mail Push** page will be populated as expected.

38. Inspect the **Commodity E-mail Push**. Select **Commodity E-mail Push** from the Secondary Navigation Panel. Vendors will receive automatic notification if they have registered for the Commodities listed on this component. This section is automatically populated based on the Commodity Code in the **Commodity** Section. You may also add and delete commodity codes as required.

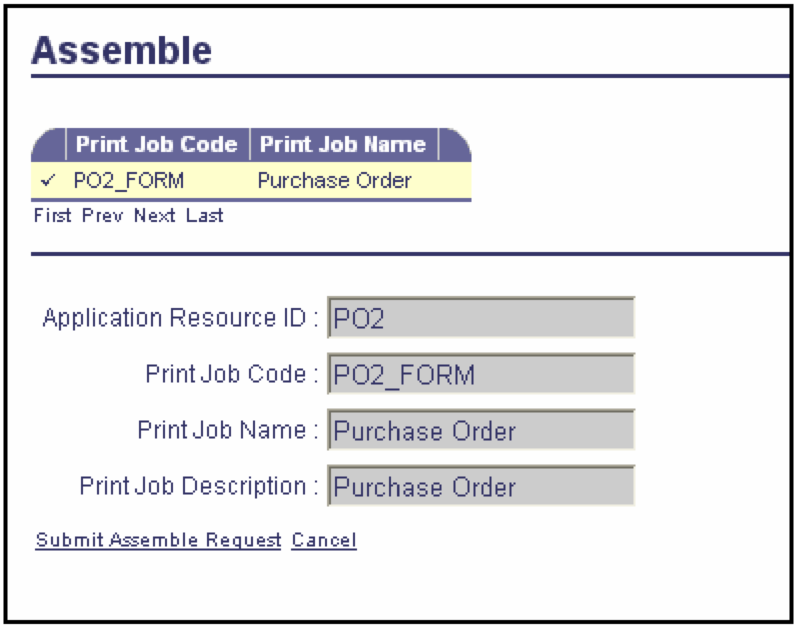


39. Complete the **Publishing** section. Click **Publishing** from the Secondary Navigation Panel.



Required Fields	Values
Let Date	**Today's date**
Close Date	**Today's date**
Close Time	**Enter a time ½ hour in the future. E.g. if it is 10:00 am enter 10:30. Times must be entered in military time. E.g. 24hrs**
Public Bid Opening Date (Optional)	**Leave blank**
Public Bid Opening Time (Optional)	**Leave blank**
Prohibit Online Responses	**Click to Select**
Evaluation Criteria (Points)	**Click to Select**

40. Once all information on the Solicitation has been verified, click **Validate** to check the document for errors.
41. Click **Header** from the Secondary Navigation Panel. Click **Assemble Document.** The **Assemble** page will open.


Assemble

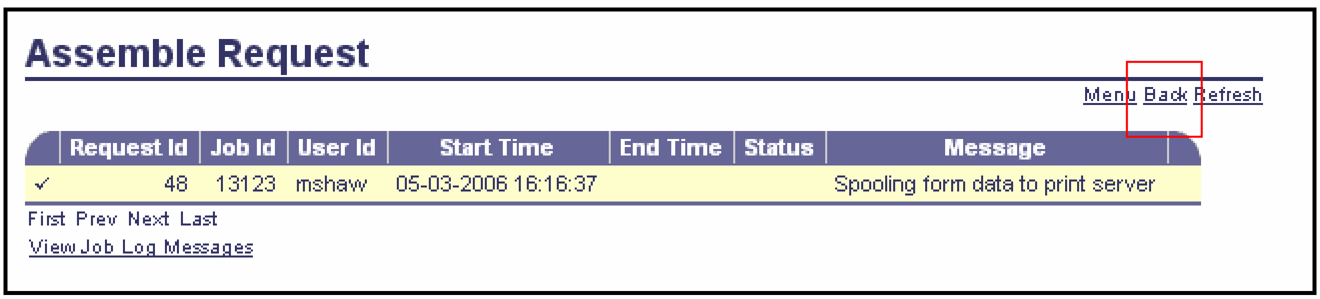
Print Job Code	Print Job Name
✓ PO2_FORM	Purchase Order

First Prev Next Last

Application Resource ID : PO2
Print Job Code : PO2_FORM
Print Job Name : Purchase Order
Print Job Description : Purchase Order

Submit Assemble Request Cancel

42. Click **Submit Assemble Request**. A batch job will be initiated to Assemble a Draft **PDF** version of the Solicitation.


Assemble Request

Menu Back Refresh

	Request Id	Job Id	User Id	Start Time	End Time	Status	Message
✓	48	13123	mshaw	05-03-2006 16:16:37			Spooling form data to print server

First Prev Next Last
View Job Log Messages

43. Click **Back** to return to the document **Header**. When the job completes, go to the **Action Menu**>>**Attachments** and **Download** the **PDF** file.

44. **Submit** the document to initiate workflow for approval.

NOTE: Write down your Document ID number on your Student Card. You will need this in the next exercise.

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5 – Record Vendor Responses Using the Solicitation Wizard.

Vendor responses are not recorded directly onto the Evaluation document but are instead individually recorded using the Solicitation Response **SR** document or the Solicitation Response Wizard **SRW** document. These responses are then loaded and consolidated in the Evaluation (**EV**) document.

Entering a Vendor Response using the Solicitation Response Wizard

Access your **Procurement Workspace** and click the **Enter Bid Response** link in the Secondary Navigation Panel. Expand the **Solicitation Response** section. Click **Solicitation Response Wizard (SRWZRD)**. The **Solicitation Response Wizard** (**SRWZRD**) page opens.

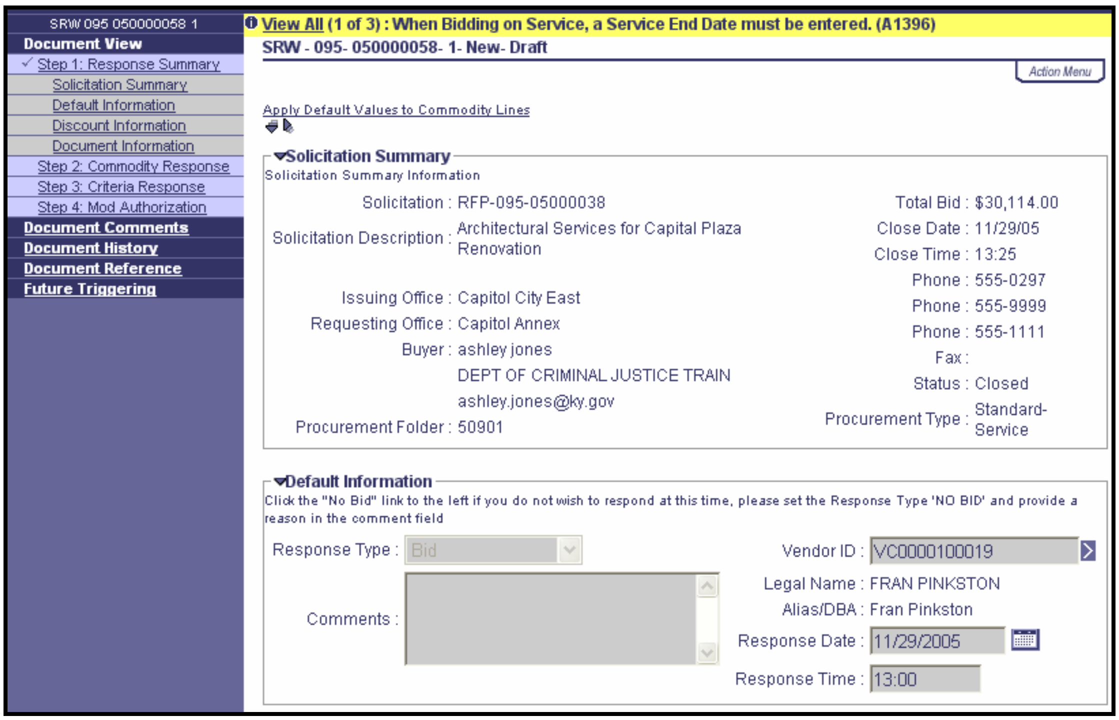
Enter the Solicitation and Vendor Information on the **SRWZRD** page. The **Solicitation Response Wizard** (**SRWZRD**) page allows you to initiate the **Solicitation Response Wizard** interface, which enables manual or paper Solicitation Responses from a Vendor to be rapidly entered into the system.

- The **Solicitation Document Code** is the document code from the Solicitation for which you want to record a Response.
- The **Solicitation Department** is the Document Department for the Solicitation for which you want to record a response.
- You may manually type in the Solicitation Document ID if you know it or you may search for it by clicking on the **arrow** to expand the pick list. The Solicitation Document ID page will open. This page is a filtered list of all those Solicitation documents where the Let Date is less then today's date and the Solicitation has not been awarded. This page will be further

filtered by the values that you have entered in **Solicitation Document Code** field and the **Solicitation Department** field.

- Select the Vendor that is responding to the Solicitation by choosing a **Vendor ID** under the **Solicitation Information** section.
- Indicate valid information into all four fields under the Solicitation Response Information section or leave all four fields blank. If all fields in this section are left blank, then when the **Create Response** link is selected, the system will default these values. If all four fields are populated with valid data when the **Create Response** link is selected, then the system will create the **SRW** document and will transition you to Step 1 of the **SRW** document.

Complete the **Response Summary** – This section displays the Solicitation and Vendor information, which was entered on the **SRWZRD** page.

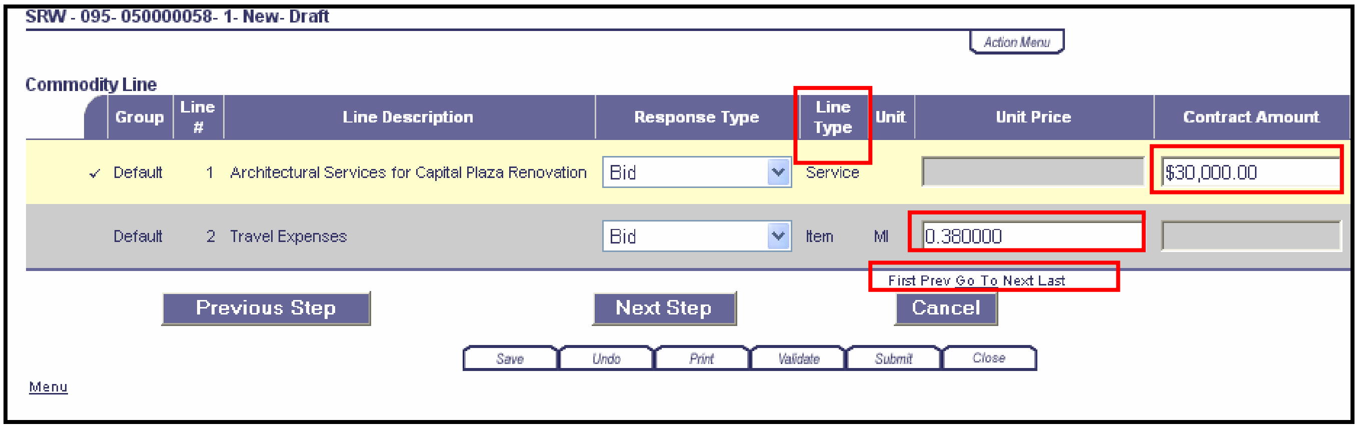


- There are two required fields in this section: **Response Date** and **Response Time.** The data entered into these fields must be after the **Let Date** and less than the **Closing Date** and **Closing Time** for the referenced solicitation.

NOTE: The Closing Time must be supplied in 24hr military time (e.g. 9:30 am=09:30, 2:00pm=14:00).

- The **Legal Name** and **Alias/DBA** for the Vendor are inferred from the **VCUST** table. Users may optionally enter prompt payment discounts and optionally record default **Response Types** as well as default **Comments**. If **Response Types** and **Comments** have been entered, and the **Apply Default Values to Commodity Lines** link is clicked, the system will populate the corresponding values on the Step 2: **Commodity Response** section upon saving.

Complete the **Commodity Response** grid. This section displays all Commodity line items for all Commodity Groups from the referenced Solicitation. Up to 15 Commodity line items can be displayed in the grid. If there are more than 15 Commodity line items, then you can navigate between the records by clicking the **Next**, **Previous**, **First**, and **Last** links. The rows in the grid are sorted by Group and then by Line Number.



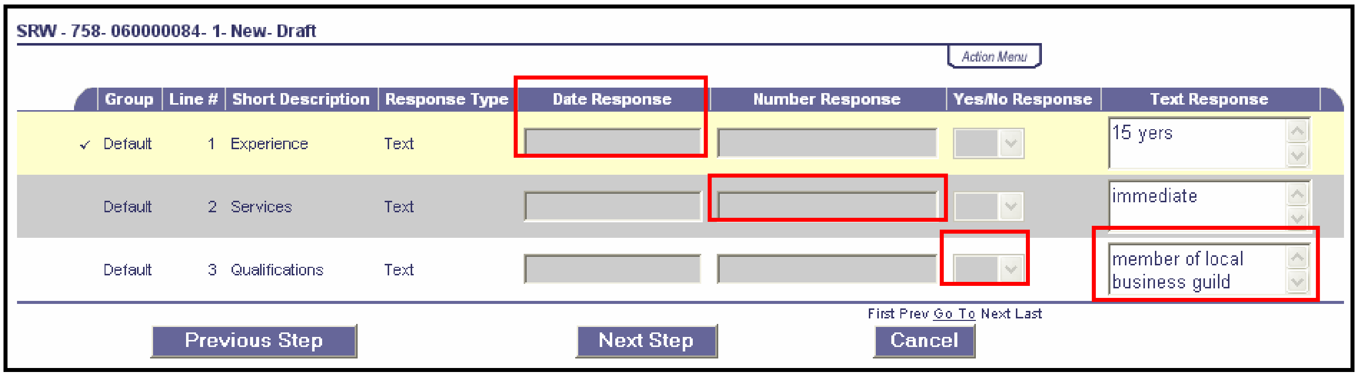
The **Line Type** determines the required fields for each Commodity line, as outlined in the table below.

If the Line Type is:	Then the Required Fields are:
Item	**Response Type, Unit, Unit Price, Delivery Days**
Service	**Response Type, Bid Contract Amount**
Discount	**Response Type, Discount %, Effective To, Effective From, Bid Catalog**
Catalog	**Response Type, Discount %, Effective To, Effective From, Bid Catalog**

- The **Response Type** for each Commodity line defaults to “Bid”, but can be changed. You can optionally enter data into the **Comments** field. If the **Response Type** for any of the above line types is “No-bid” then you should only enter text in the **Comments** field; however, the system will not prevent you from entering data in the other fields.

- You may use the **TAB** Key to navigate through the grid. Using the **TAB** key will advance the user to the next allowable field based on line type. If the cursor is in the last allowable field for a row then using the **TAB** key will transition to the cursor to the first row on the next line.

Complete the **Criteria Response** grid. This section displays all **Evaluation Criteria** lines for the different Criteria Groups from the referenced Solicitation. Up to 15 criteria lines can be displayed in the grid. If there are more than 15 lines, then you can navigate between the records by clicking the **Next**, **Previous**, **First**, and **Last** links. The rows in the grid are sorted by Group and then by Criteria Number. Only the required fields for each Line Item Type are editable.



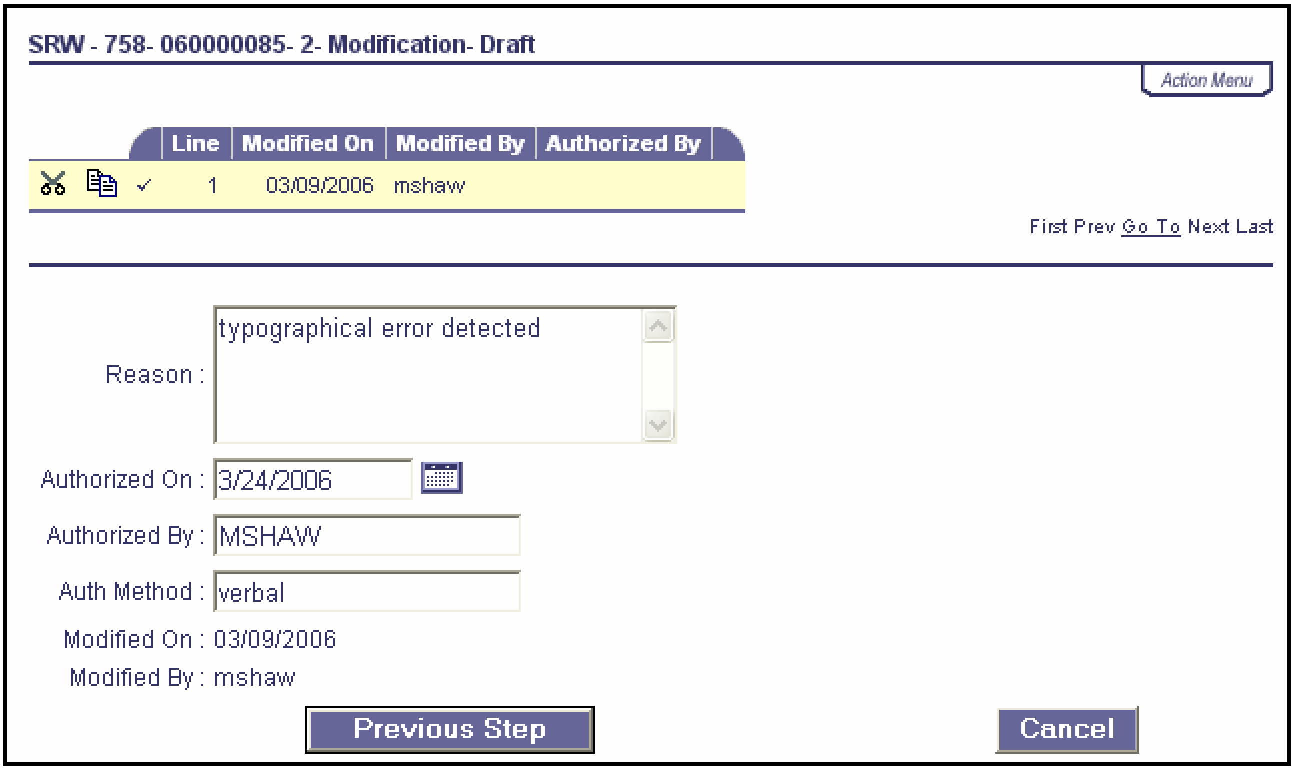
The **Response Type** for each criterion on the Solicitation determines which response field is required on the SRW.

If the Response Type is:	Then the Required Fields is:
Date	**Date Response (mm/dd/yyyy)**
Number	**Number Response (any numeric value)**
Yes/No	**Yes/No Response**
Text	**Text Response (Can be any combination of text and numbers up to 256 characters)**

Click **Validate** and then **Submit** to finalize the **SRW** document. When you close the document you will transition back to the **SRWZRD** page where you can enter a response for a new Vendor without retyping the Solicitation ID.

NOTE: Approvals are not required for Solicitation Response Wizard (**SRW**) documents. They will submit to final.

If you need to modify a finalized **SRW** you must complete the Mod Authorization step.



- In order to submit a modification to a **SRW** document, you must describe the reason for the modification in the **Reason** field
- List who authorized the modification in the **Authorized By** field
- Record the date the modification was authorized in the **Authorized On** field.

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Exercise 2 – Record a Vendor Response to the RFB using the SR Wizard.

Scenario

You have received several paper responses to the **RFB** you created in Exercise 1. You must record these responses into the system.

Task Overview

You will access the **Solicitation Response Wizard** from your **Procurement Workspace** and initiate two Vendor Responses to the **RFB** document you created in Exercise 1. You will record the Vendors price quotations and enter Vendor Responses to the Evaluation Criteria. You will create two **SRW** documents.

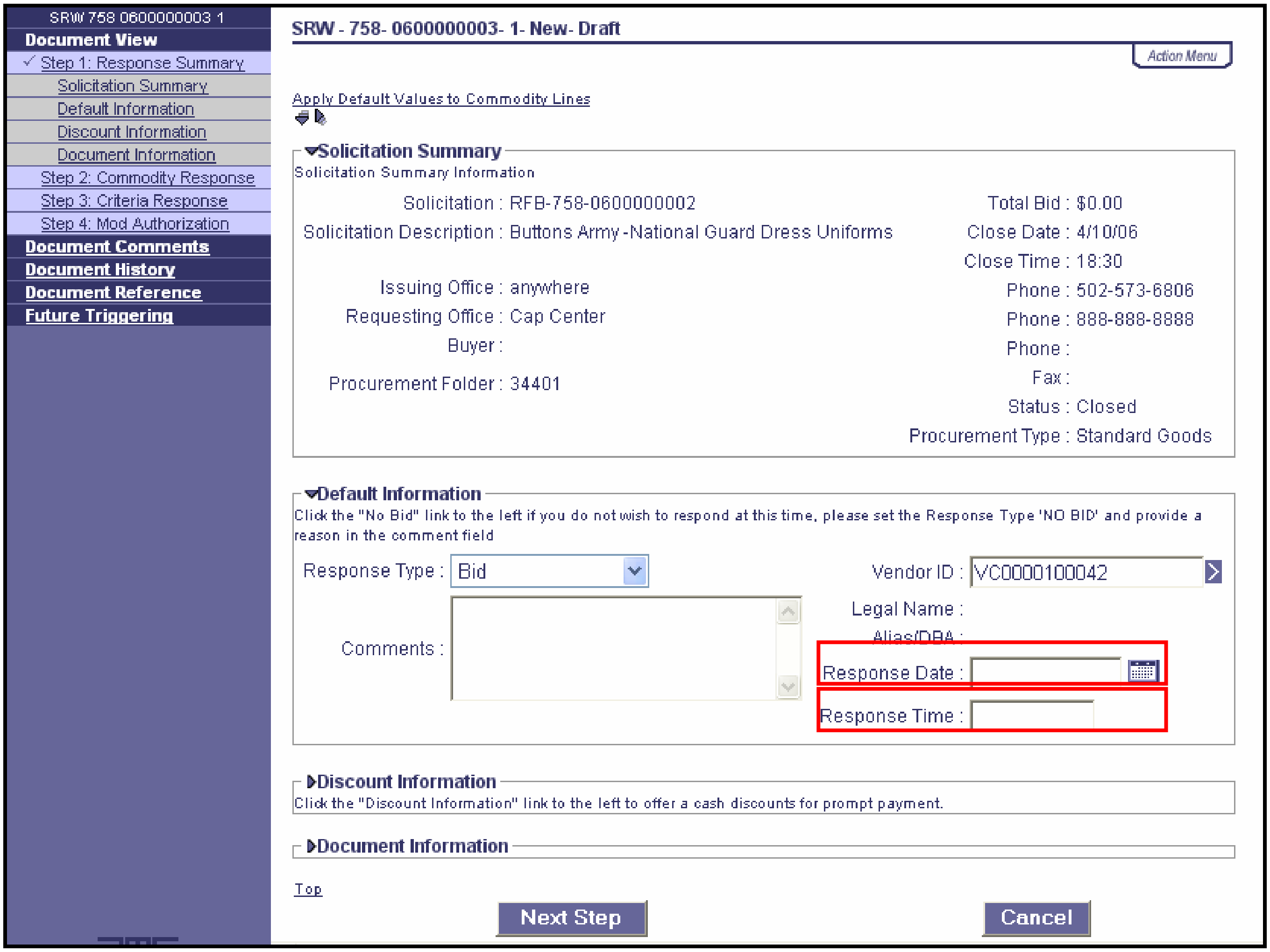
Procedures

1. Access your **Procurement Workspace** and click **Enter Bid Response** in the Secondary Navigation Panel. Expand the **Solicitation Response** section.
2. Click **Solicitation Response Wizard (SRWZRD)**. The **Solicitation Response Wizard** page opens.
3. Enter the Solicitation and Vendor Information on the **SRWZRD** page. The Solicitation Response Wizard (**SRWZRD**) page allows you to initiate the **Solicitation Response Wizard** interface, which enables manual or paper Solicitation Responses from a Vendor to be rapidly entered into the system.

Required Fields	Values
Solicitation Document Code	**RFB**
Solicitation Department	**See Student Card**
Solicitation Document ID	**Enter the RFB you created in the previous exercise**
Vendor ID	Enter **Vendor 1** from Student Card. For the second Response use **Vendor 2** from your student card.
Solicitation Response Document Code	**Leave blank**
Solicitation Response Document Department	
Solicitation Response Document Unit	
Solicitation Response Document ID	

4. Click **Create Response**.

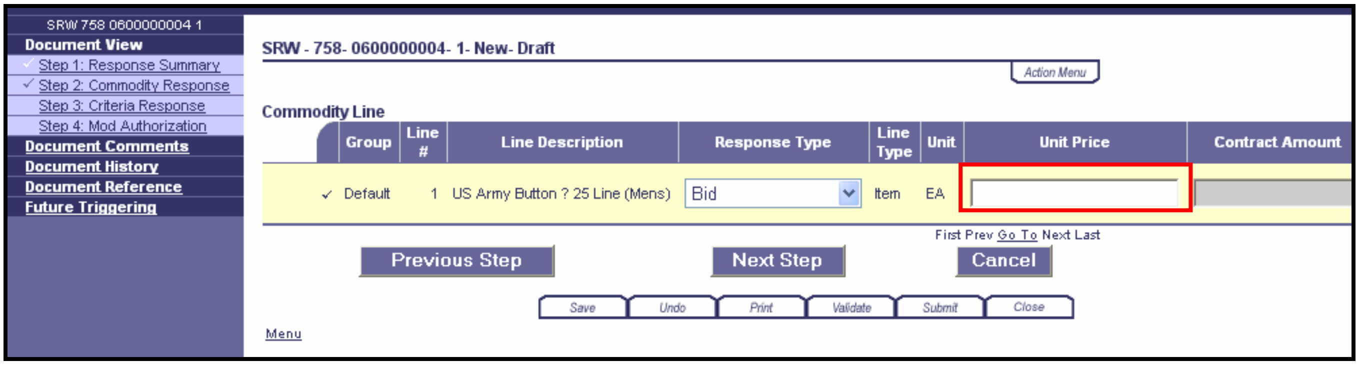
5. Complete the **Response Summary** Section. This section displays the Solicitation and Vendor information, which was entered on the **SRWZRD** page.



Required Fields	Values
Response Date	**Today's date**
Response Time	**Enter a time that is before the Close Time listed on the Solicitation you created in Exercise 1.**

Other Fields	Values
Legal Name	Inferred from the **VCUST** table.
Alias/DBA	Inferred from the **VCUST** table.
Response Type	If **Response Type** and **Comments** have been entered, and the **Apply Default Values to Commodity Lines** link is clicked, the system will populate the corresponding values on the Step 2: **Commodity Response** section upon saving.
Comments	

6. Click **Next Step** and complete the **Commodity Response** grid. Enter the required fields below.



Enter the following information for A and K Construction (Vendor 1):

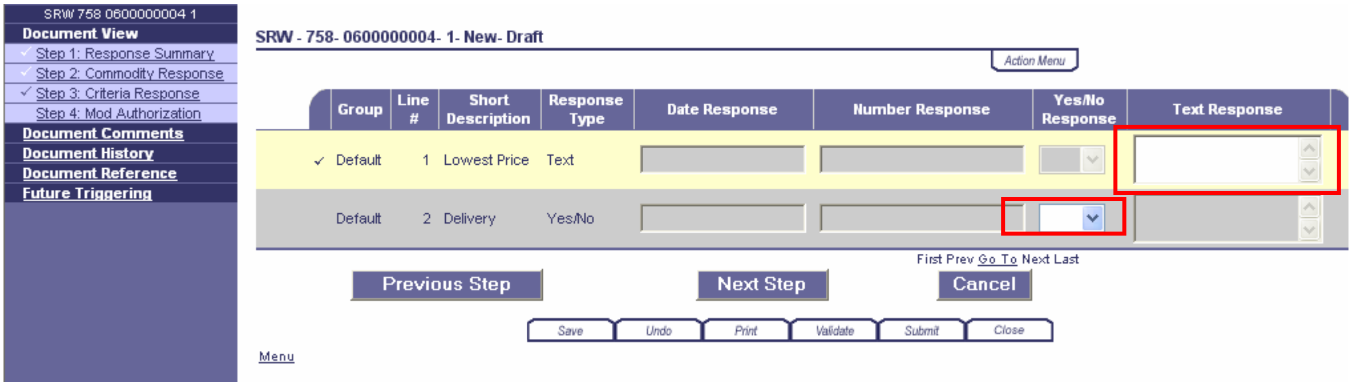
Required Fields	**Values**
Response Type	Leave as defaulted.
Unit Price	.86
Delivery Days	5
Comments (Optional)	Leave blank. NOTE: If the Response Type for any of the above line types is no-bid then you should only enter text in the Comments field; however, the system will not prevent you from entering data in the other fields.

Enter the following information for Kentucky Outdoor Center (Vendor 2):

Required Fields	**Values**
Response Type	Leave as defaulted.
Unit Price	.99
Delivery Days	9
Comments (Optional)	Leave blank. NOTE: If the Response Type for any of the above line types is no-bid then you should only enter text in the Comments field; however, the system will not prevent you from entering data in the other fields.

NOTE: You may use the **TAB** key to navigate through the grid. Selecting the **TAB** key will advance your cursor to the next required field based on line type. If the cursor is in the last required field for a row then typing the **TAB** key will transition to the cursor to the first row on the next line.

7. Click **Next Step** and complete **Criteria Response** grid. Enter the Test Response for each criteria.



Enter the following Criteria Response information for A and K Construction (Vendor 1):

Required Fields	**Values**
Text Response	For evaluation criteria "**LOWEST PRICE**" enter "**GREAT PRICING, SEE ATTACHED**"

Required Fields	**Values**
Text Response	For evaluation criteria "**DELIVERY**" enter "**YES**"

Enter the following Criteria Response information for Kentucky Outdoor Center (Vendor 2):

Required Fields	**Values**
Text Response	For evaluation criteria "**LOWEST PRICE**" enter "**SUPERIOR PRICING**"

Required Fields	**Values**
Text Response	For evaluation criteria "**DELIVERY**" enter "**YES**"

8. Click **Validate** and check for errors. After correcting any errors, click **Submit**.
9. Click **Close** and you will be returned to the **SRWZRD** page. You can enter a response for a new Vendor without retyping the Solicitation ID.
10. Record a second Vendor Response for **Vendor 2** from your Student Card.
11. Delete the previous vendor's code and enter the second Vendor's, Vendor Code.
12. Complete steps 3-9 again for the next Vendor.

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6 – Consolidate and Evaluate Vendor Responses on the EV document

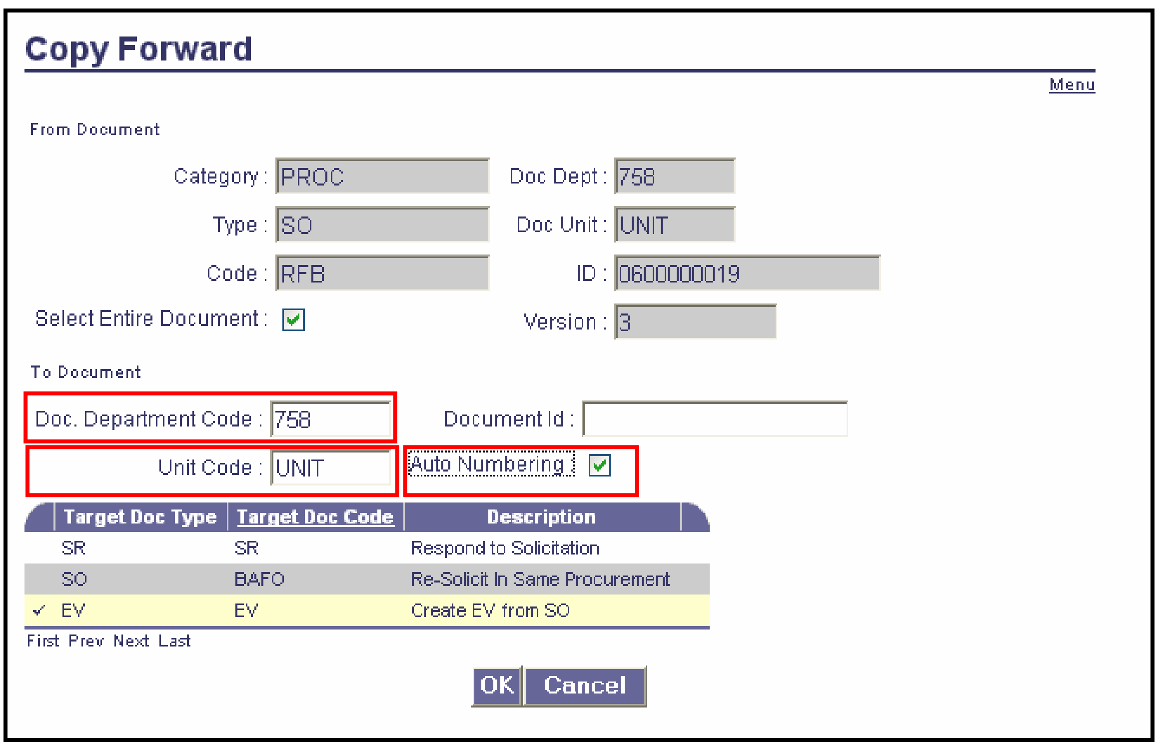
The Evaluation (**EV**) document allows you to view responses from vendors for a specific solicitation. Much of the information on the Evaluation document defaults from the Solicitation document. The remaining information comes from the **Solicitation Responses** and from Evaluator documents.

The Evaluation document consists of a series of sections that display the information collected in various views and totals the scores collected from the Evaluator documents for the Solicitation. The Evaluation document is used to issue awards.

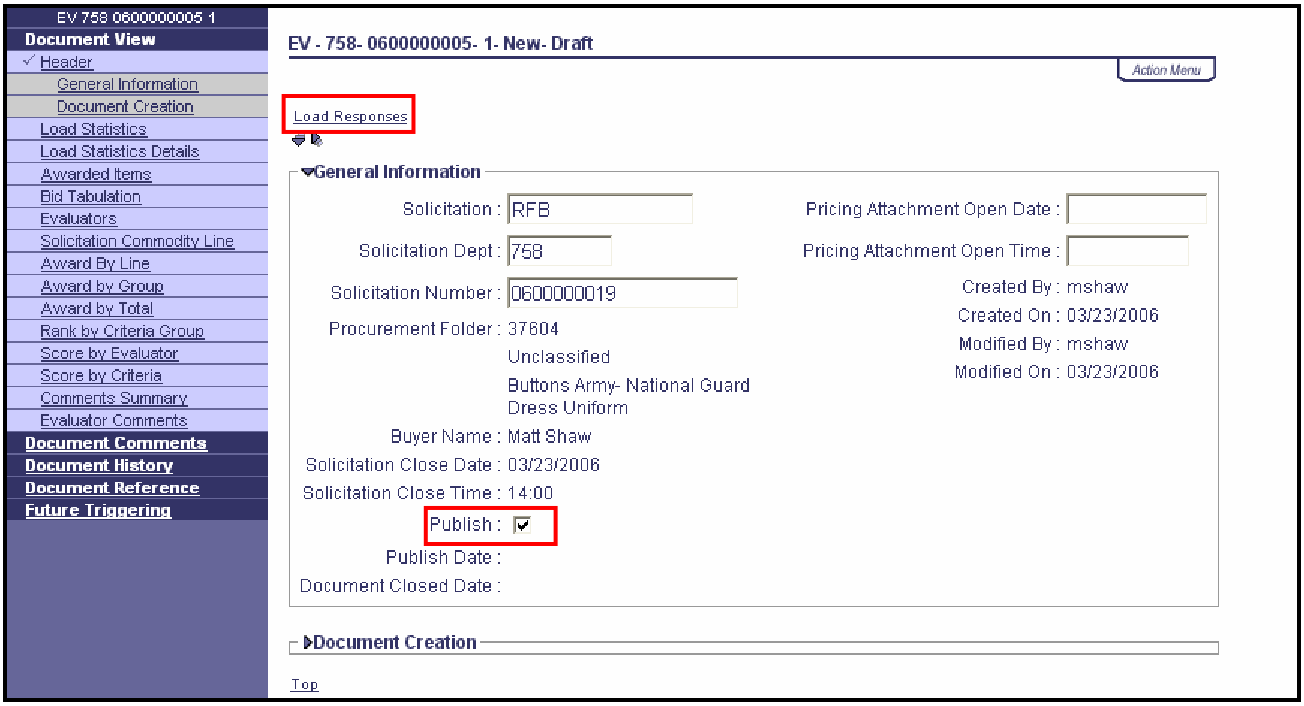
For off-line analysis, eMARS has the ability to generate a Bid-Tabulation in Microsoft Excel which can be printed.

The Evaluation Process

To create the **Evaluation** (**EV**) document, **Copy Forward** from a Solicitation to the **EV** document. Complete the **Document Department**, **Document Unit** and select **Auto-Numbering**.



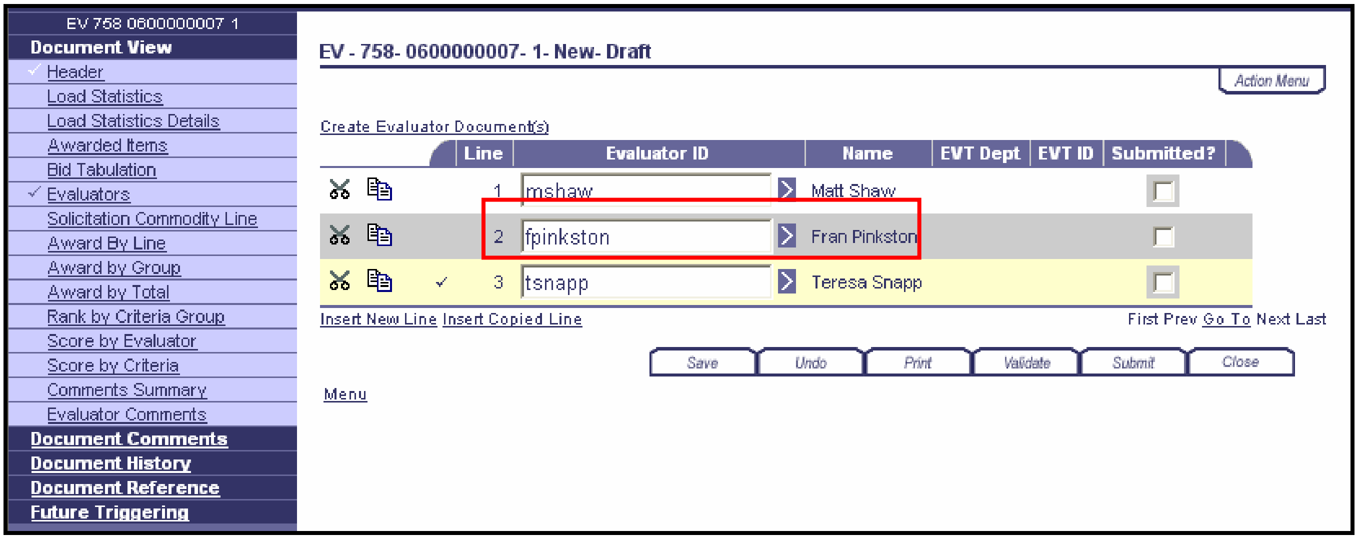
Load the Responses into the Evaluation document. After the Closing Date has passed you may load all responses into the **EV** for inspection and analysis.



- Clicking on the **<u>Load Responses</u>** link will bring all Solicitation Response documents into the **EV**. This includes SRW, SR and Bids submitted through Vendor Self Service (**VSS**).
- The **Publish** check-box on the **EV** document is used to post Public Bid Opening information for a Solicitation document to Vendor Self Service (**VSS**). **<u>This field defaults to unchecked and this should always be populated, so that all awards made from the EV will be posted as required by the Commonwealth.</u>**

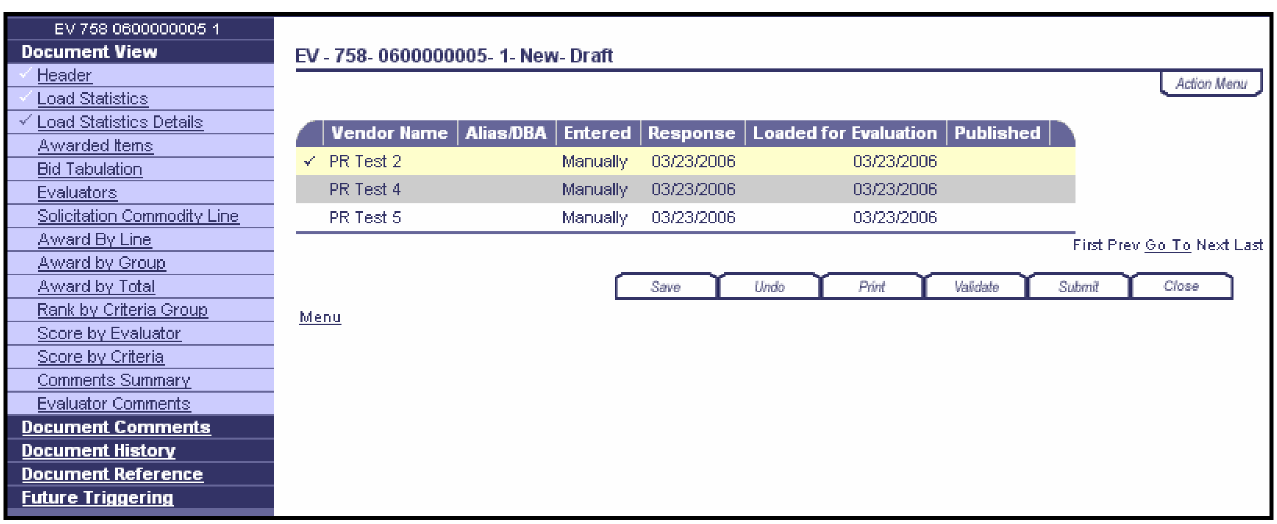
Inspect the **Load Statistics Details** section to see all the Vendors who have responded and which bids have been loaded into the **EV**.

When evaluating a Vendor's responses to a solicitation you have the option to build an Evaluation Team. The Evaluator document allows you to establish a Bid-Evaluation team. The purpose of the team is to have experts in the field score and asses Vendor Responses for a given opportunity. Each user identified in the Grid will be sent an e-mail requesting them to completing an **EVT** document that they can locate from the Document Catalog.

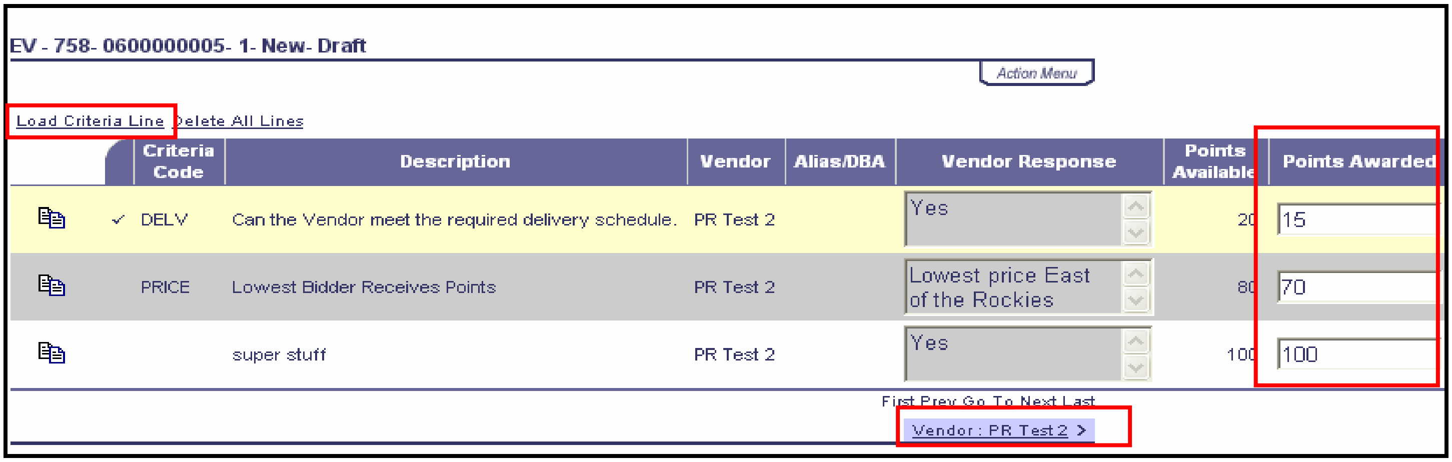


- The **Evaluator ID** is the eMARS User-ID of the person selected to perform the evaluation.

Once all the Users have been selected click **Create Evaluator Document**(s). Clicking this link will create an **EVT** document for each User to complete.

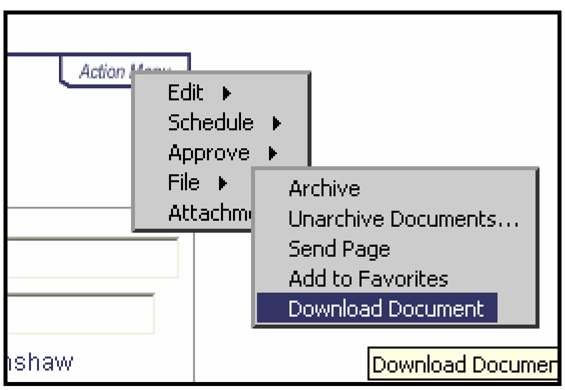


Score Vendor Responses to Evaluation Criteria in the **Score by Criteria** section. This page allows buyers to view and score the Vendors' criteria responses directly on the **EV** document by clicking **Load Criteria Line**. An exchangeable grid is used to switch between vendors. Evaluations that are entered via the **EVT** document will not display on this section.

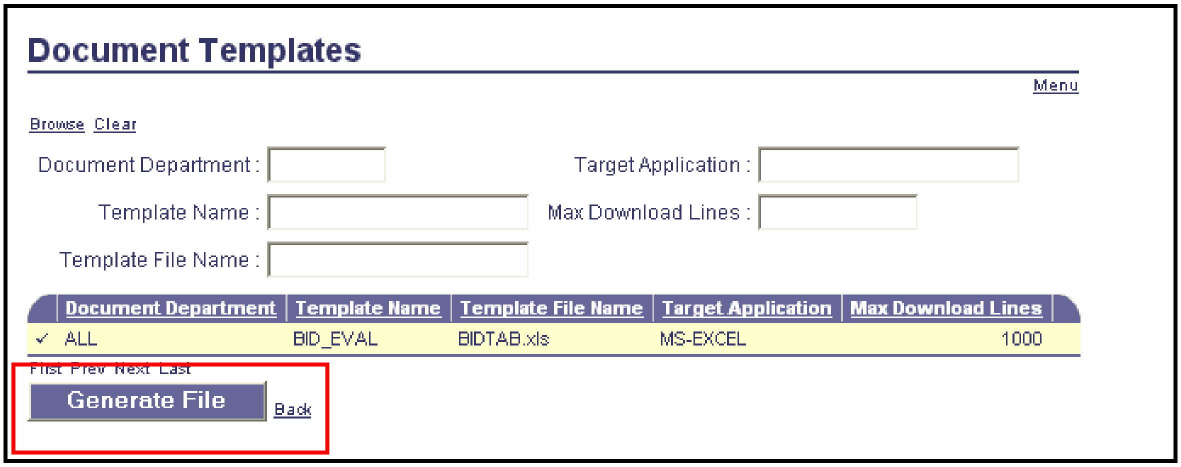


- Click on the **Load Criteria Line** link to load in all of the Vendors' responses to Evaluation Criteria.
- Use the **Vendor:** link to toggle between Vendors and score each Vendor's responses.
- Use the **Points Awarded** field to establish a score for each Vendor's Evaluation Criteria response.

Download all Bids into the MS-EXCEL Bid-Evaluation Template. From the **Action Menu**, click on **File**>>**Download Document**.



Generate the Bid Tabulation Spreadsheet. Select the **BID_EVAL** template and click on the **Generate File** button.



Inspect the Bid-Tabulation Spreadsheet. **MS-EXCEL** will open with the data from the Vendor's responses tabulated.

The **Total Bid** worksheet displays Vendors ranked lowest to highest based on the total cost of their bid. The lowest Vendor will be placed on the left and the highest will be on the right.

	A	B	C	D	E
1		**PR Test 4**	**PR Test 5**	**PR Test 2**	
2	Line 1	528	240	1080	
3	Line 2	1080	1056	960	
4	Line 3	2880	4320	3600	
5	Total Bid	4488	5616	5640	
6					
7					

The **Line Item Group** worksheet consolidates all Vendors responses on a Commodity Group basis. Vendors' Responses to each group will be group together and then sorted lowest price to highest price.

	A	B	C	D	E
2	Group No	Group Name	Vendor Name	Bid/No Bid	Group Total Cost
3	1	Men's buttons	PR Test 4	Bid	4488.00
4	1	Men's buttons	PR Test 5	Bid	5616.00
5	1	Men's buttons	PR Test 2	Bid	5640.00
6	2	Women's buttons	PR Test 4	Bid	0.00
7	2	Women's buttons	PR Test 2	Bid	0.00
8	2	Women's buttons	PR Test 5	Bid	0.00
9					

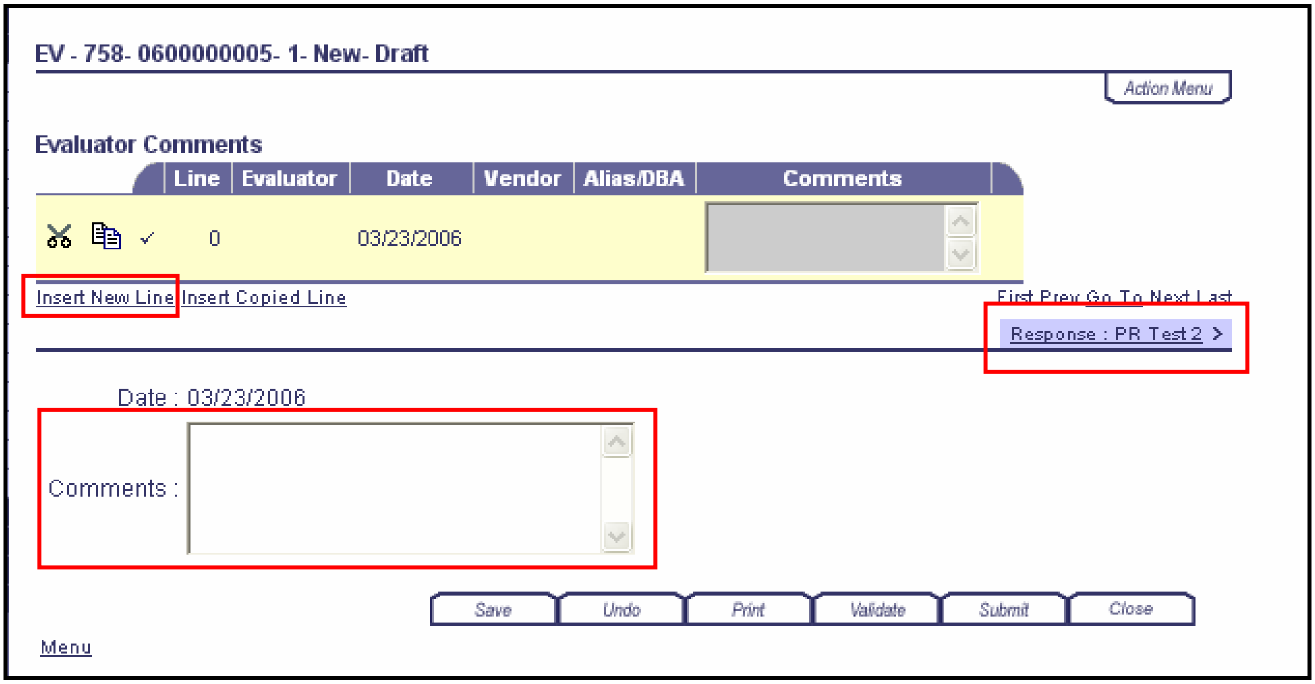
The **Line Item** worksheet consolidates all Vendor Responses on a commodity line by commodity line basis. All responses to the same line item are grouped together and then sorted in ascending order i.e. lowest to highest.

Line #	Line Item Type	Vendor	Line Description	Bid Qty	Bid UOM	Unit Price	Line Item Tota
*							
1	Item	PR Test 5	US ARMY BUTTON-25 LINE (Mens)	12000.00000	EA	0.020000	240.00
1	Item	PR Test 4	US ARMY BUTTON-25 LINE (Mens)	12000.00000	EA	0.044000	528.00
1	Item	PR Test 2	US ARMY BUTTON-25 LINE (Mens)	12000.00000	EA	0.090000	1080.00
2	Item	PR Test 2	US ARMY BUTTON-30 LINE (Lady)	12000.00000	EA	0.080000	960.00
2	Item	PR Test 5	US ARMY BUTTON-30 LINE (Lady)	12000.00000	EA	0.088000	1056.00
2	Item	PR Test 4	US ARMY BUTTON-30 LINE (Lady)	12000.00000	EA	0.090000	1080.00
3	Item	PR Test 4	US ARMY BUTTON-36 LINE (Mens)	36000.00000	EA	0.080000	2880.00
3	Item	PR Test 2	US ARMY BUTTON-36 LINE (Mens)	36000.00000	EA	0.100000	3600.00
3	Item	PR Test 5	US ARMY BUTTON-36 LINE (Mens)	36000.00000	EA	0.120000	4320.00

Save the MS-EXCEL file to your local file system. You may attach the Bid Tabulation to the Evaluation document for future reference.

Record an Award Justification for each Vendor receiving an award on the **Evaluator Comments** section. At least one comment must exist for all Vendors selected for award. If a comment does not exist an error will be received upon attempted creation of the award document.

Evaluator comments can also be recorded for Vendor not receiving an award. Buyers can record reasons for bid rejection or other pertinent information that should be included in the bid file.



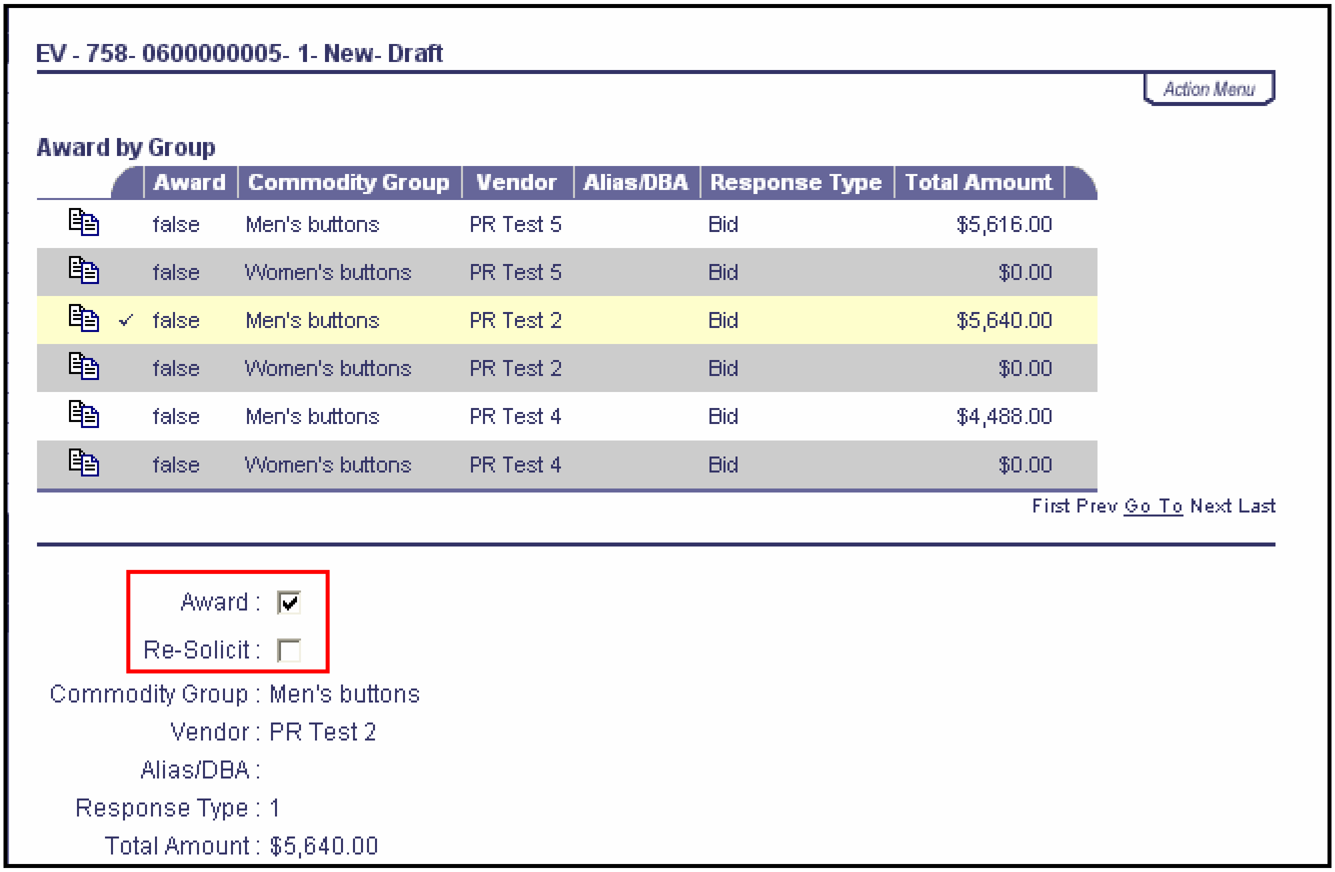
- **Comments** – Record your award justification in this box.
- Use **Response: Vendor** to toggle between Vendors.

Choose how the award will be generated. Awards can be generated one of three ways: Award by Total, Award by Group or Award by Line. You will need to complete only one of these sections to determine who will be granted the award.

If you are awarding the total document to a Vendor you will choose the **Award by Total** section. Award all line items to a Selected Vendor by choosing the Vendor in the Grid section and selecting the **Award All?** Check-box. After making the selection in this section, transition to the **Header**, expand the **Document Creation** section, and generate the Award document.

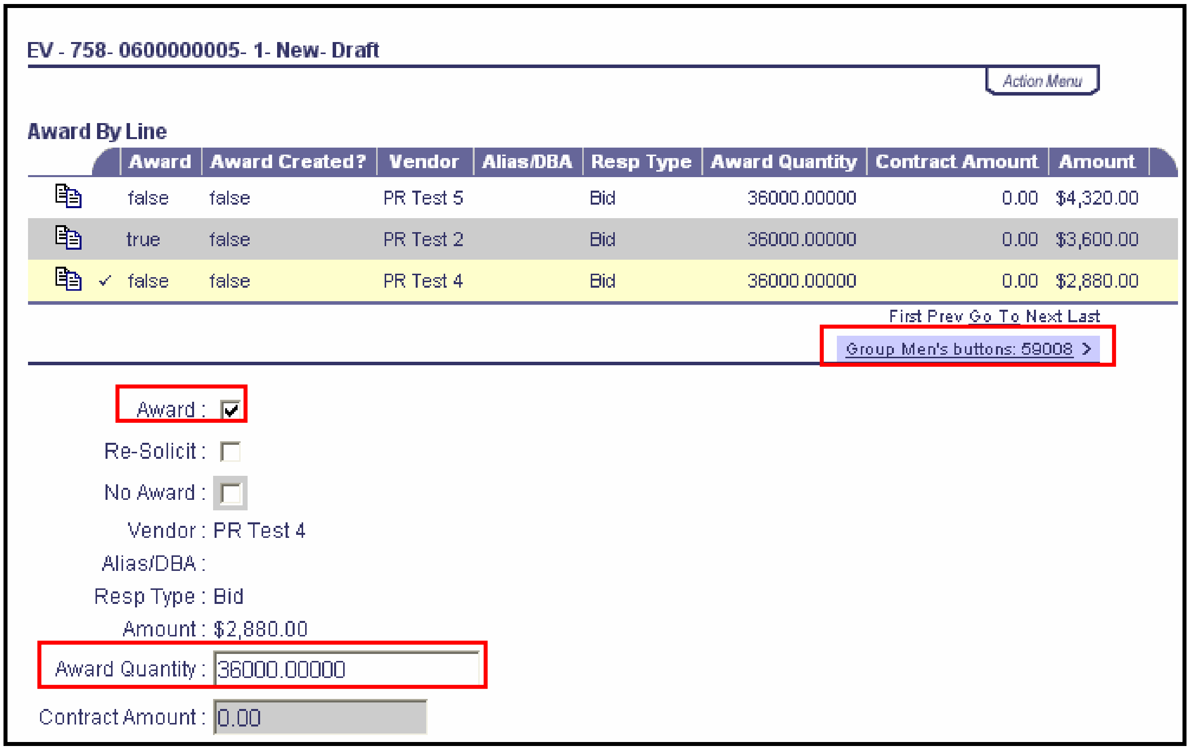
- Selecting the **Award All?** check-box indicates that you would like to create an award for the Vendor selected in the grid section for all commodity lines on the Solicitation.
- Selecting the **Re-Solicit** check-box indicates that no award will be created.

If you are awarding by Commodity Group(s) you will choose the **Award by Group** section. In the Grid section, select a Group and Vendor with which to create an Award. After making the selection, transition to the **Header**, expand the **Document Creation** section, and generate the Award document.



- Selecting the **Award** check-box indicates that you would like to create an award for the Vendor selected in the grid section for all Commodity lines in the selected Commodity Group.
- Selecting the **Re-Solicit** check-box indicates that no award will be created for the Commodity Group in question.

If you are awarding Commodity Line(s) to a Vendor you will choose the **Award by Line** section. In the Grid section select a Vendor with which to create an Award. To select a different line for award, click on the link at the bottom of the grid. After making the selection, transition to the **Header**, expand the **Document Creation** section, and generate the Award document.

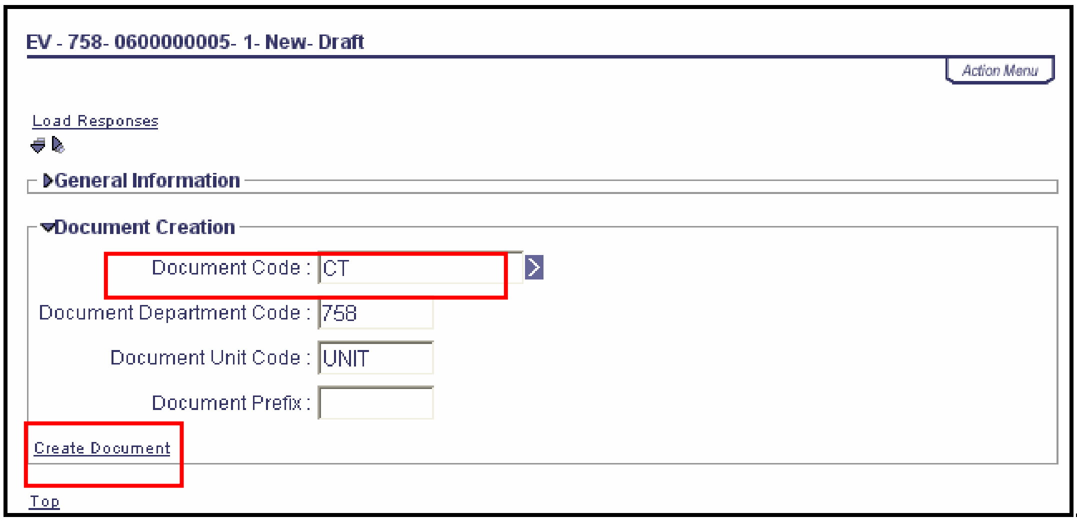


- Selecting the **Award** check-box indicates that you would like to create an award for the Vendor selected in the Grid section for the selected Commodity lines.
- The **Award Quantity** is used to split how many individual units of quantity are being awarded. You may award over the total quantity of the Solicitation line.

Generate the Awards one Vendor at a time from the **Documents Creation** section in the **EV** Header. When an award is generated from the **EV** it will take information from several places:

- **Terms and Conditions** and **Supporting Documents** will be copied from the Solicitation.
- Accounting information will be copied from a referencing Requisition (**RQS**), if it exists.
- Pricing will be taken from the Vendor's bid as recorded on the **Solicitation Response** (**SR**/**SRW**) document.
- The Vendor will be taken from the **Solicitation Response** (**SR**/**SRW**) Document.

NOTE: Award documents with Accounting consequences that reference a Requisition will be generated with a **MEMO** Commodity and Accounting line reference back to the Requisition (**RQS**). The reason for this is to allow for multiple awards without closing out the Requisition Commodity lines. If you desire to close out the Requisition and prevent future awards from being generated, you must change the reference to **Final**.



- The **Document Code** field allows user to select the target document code that will be created (e.g. Master Agreement (**MA**), Contract (**CT**) or Purchase Order (**PO**), ect)..
- Clicking **Create Document** will create the document for the Vendor and line items selected on **Award by Total**, **Award by Group** or **Award by Line** sections.

NOTE: A single Solicitation line may not be awarded twice to the same Vendor.

NOTE: Only one Award may be created at a time. Every time the **Create Document** link is clicked, the **Award by Total**, **Award by Group** or **Award by Line** sections may only have selections made for a single Vendor.

Inspect the **Award Items** section to track how each line was awarded. You may open the Generated documents by clicking on the **Hyperlink Document ID**.

NOTE: If an item is deleted from a generated award it will correspondingly be deleted from this inquiry.

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Action Menu

	Line	SO Commodity Line No	Award Link	Vendor Code	Vendor Name	Alias/DBA	Quantity Awarded	Contract Amount	Discount
✓	1	1	CT,758,0600000021	VC0000100005	PR Test 5		12000.00000	0.00	
	2	2	CT,758,0600000021	VC0000100005	PR Test 5		12000.00000	0.00	
	3	3	CT,758,0600000021	VC0000100005	PR Test 5		36000.00000	0.00	
	4	1	CT,758,0600000022	VC0000100004	PR Test 4		12000.00000	0.00	
	5	1	CT,758,0600000023	VC0000100002	PR Test 2		12000.00000	0.00	
	6	2	CT,758,0600000023	VC0000100002	PR Test 2		12000.00000	0.00	
	7	3	CT,758,0600000023	VC0000100002	PR Test 2		36000.00000	0.00	

First Prev Go To Next Last

When the Awards that were generated from the **EV** have been submitted to Final, you will return to the **EV** document and submit it to final as well. This action will trigger the upload of Award information to Vendor Self Service (**VSS**).

Exercise 3 – Evaluation and Tabulate Vendor Responses to the RFB using the EV document and Excel document download

Scenario

You need to evaluate and compare the Bids that came in for the **RFB** for Buttons you created in Exercise 1 and the Responses you created in Exercise 2. You need to award a three-way-match Contract (**CT**).

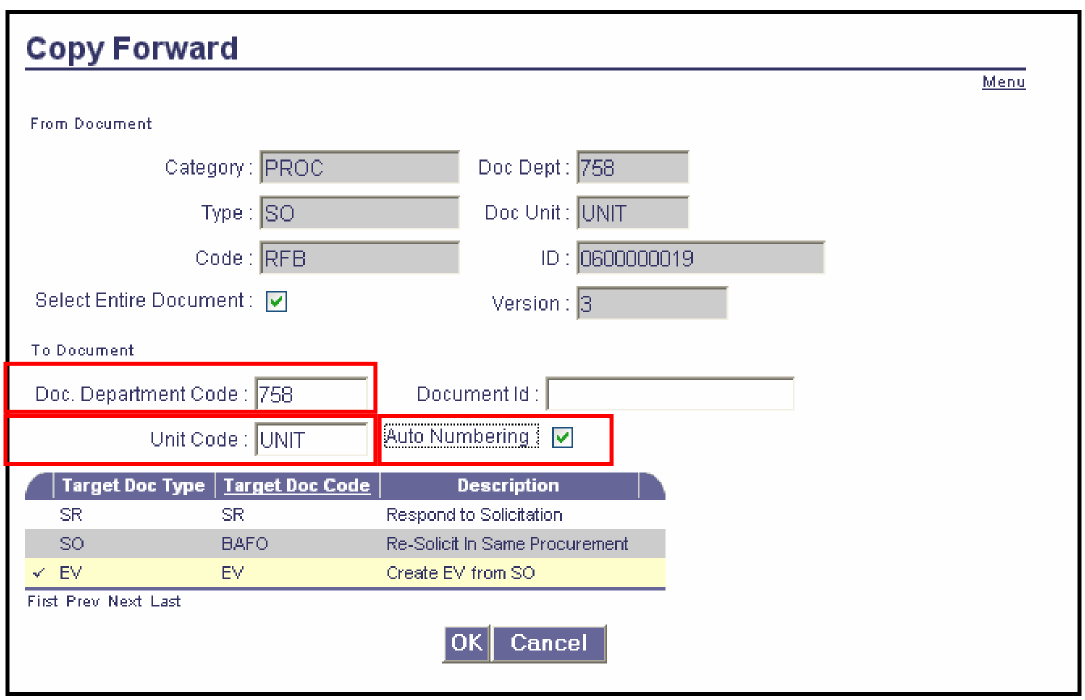
Task Overview

Access the **RFB** you created in Exercise 1 from the Document Catalog and **Copy Forward** to an **EV** document. When the **EV** is created load in all of the responses and initiate the Public Bid Reading in **VSS**. Inspect and score the Vendor's responses to your evaluation criteria.

Download the **EV** document into a Bid-Tabulation spread-sheet and record an Award Justification using the **Evaluator Comments** section for each Vendor being awarded a Contract (**CT**). You will award multiple Contracts from the **EV** using the Award by Line and Award all sections. Once the contracts have been generated you will access them from the awarded items inquiry and Submit them to Final. Once all awards have been Submitted to Final return to the **EV** document and Submit it to Final.

Procedures

1. Access the **Document Catalog** and open the **RFB** you created in Exercise 1. If you have not logged out since it was created, you may open you **History** in the Secondary Navigation Pane to find a Hyperlink to the document. Click **Search** in the Secondary Navigation Panel and click **Document Catalog**. Enter the **Document ID** of the Solicitation you created in Exercise 1
2. Click **Copy Forward** from the **RFB** to create the **EV** document.



Enter the following information:

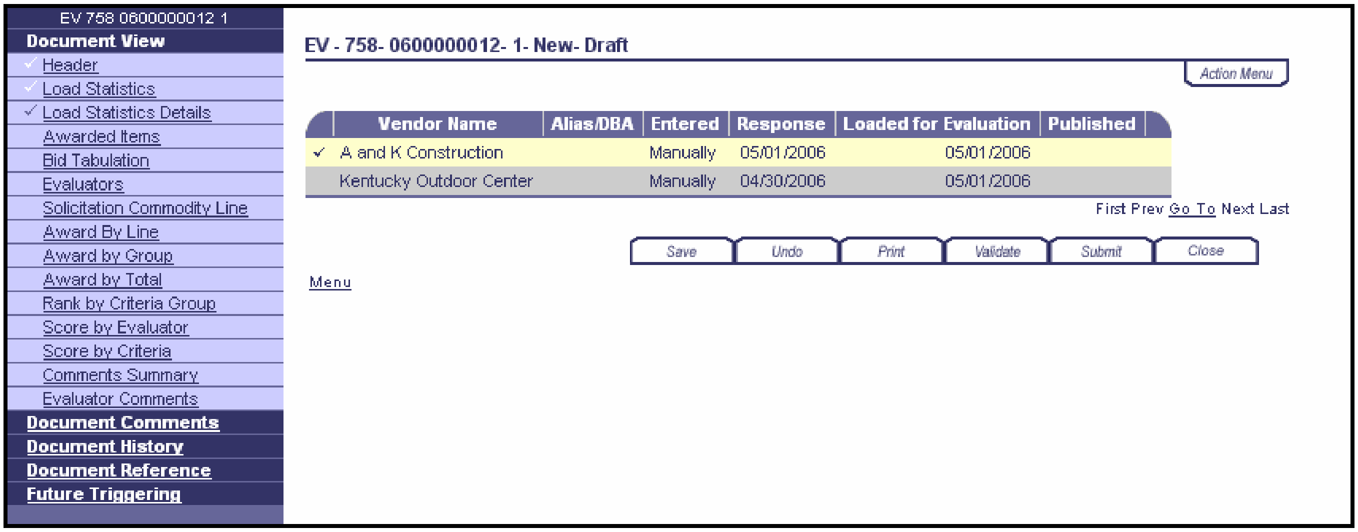
Required Fields	Values
Doc. Department Code	See Student Card
Unit Code	See Student Card
Auto-Numbering	Select the check box.

3. Click the **EV** line in the grid as your Target Document Code
4. Click **OK**. An Evaluation document (**EV**) is created.
5. Click **Load Responses** to bring all Solicitation Response documents into the Evaluation Document (**EV**). This includes **SRW**, **SR** and Bids submitted through Vendor Self Service (**VSS**).

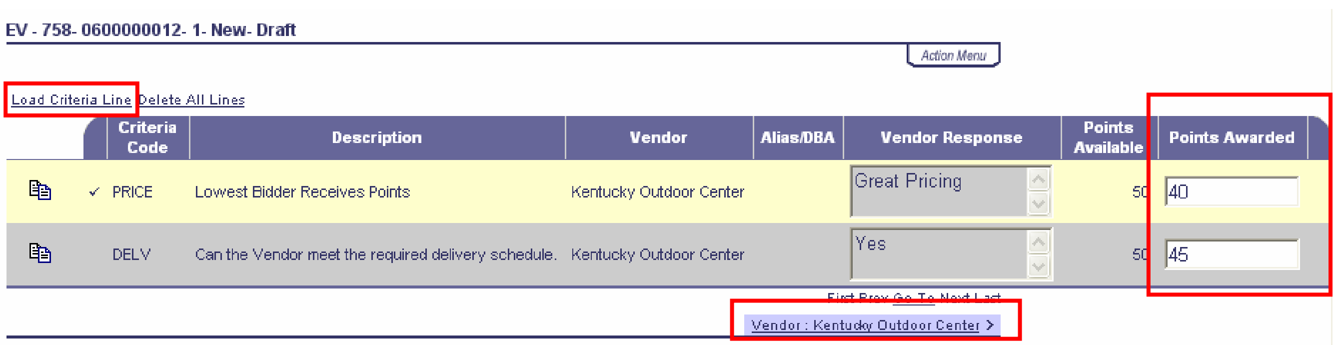
6. Enter the following required fields:

Required Fields	Values
Publish	Click to select.

7. Click **Load Statistics Details** on the Secondary Navigation Panel. Review this section to see all the Vendors who have responded and which bids have been loaded into the **EV**.



8. Click **Score by Criteria** on the Secondary Navigation panel. This page allows Buyers to view and score the Vendors' criteria responses directly on the **EV** document by clicking **Load Criteria Line**. An exchangeable grid is used to switch between Vendors. Evaluations that are entered via the **EVT** document will not display on this section.

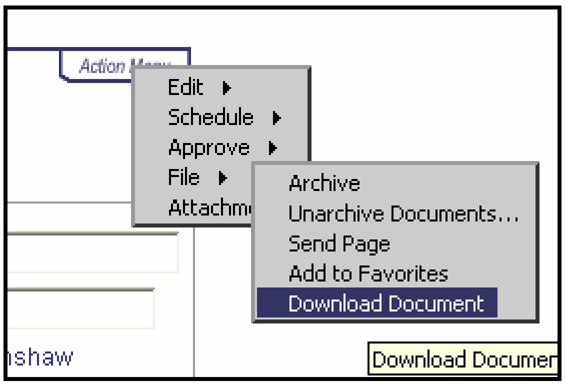


9. Click **Load Criteria Line** to load in all of the Vendors' responses to Evaluation Criteria.

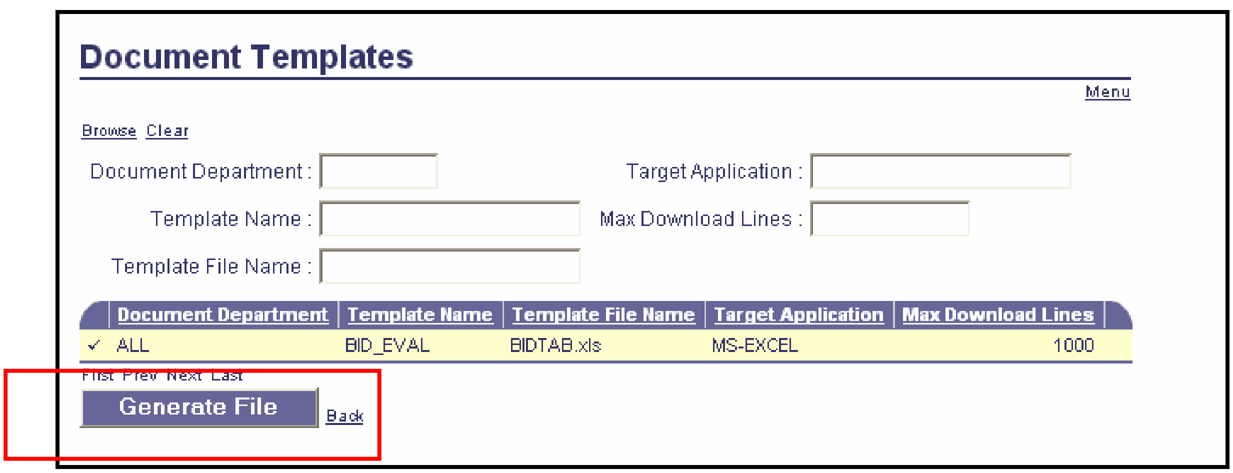
10. Score Vendor Responses to Evaluation Criteria. Use the **Points Awarded** field to establish a score for each vendor's Evaluation Criteria Response. Enter the following scores for each Vendor. To toggle between Vendors and score each vendor's responses, click the **Vendor** link.

Required Fields	Values
Points Awarded	Vendor: A & K Construction PRICE: 50 DELIVERY 50
	Vendor: Kentucky Outdoor Center PRICE: 43 DELIVERY 27

11. From the **Action Menu** click on **File**>>**Download Document** to download all Bids into the MS-EXCEL Bid-Evaluation Template.



12. To generate the Bid Tabulation spreadsheet, select the **BID EVALUALTION** template and click **Generate File**.



13. When given the option to **Open** or **Save** the file, click **Open** on the windows dialog box.

14. The MS-EXCEL opens with the data from the Vendor's responses tabulated. Inspect the Bid-Tabulation spreadsheet.

    a) The **Total Bid** worksheet displays Vendors ranked lowest to highest based on the total cost of their bid. The lowest Vendor will be placed on the left and the highest will be on the right.

	A	B	C	D	E
1		PR Test 4	PR Test 5	PR Test 2	
2	Line 1	528	240	1080	
3	Line 2	1080	1056	960	
4	Line 3	2880	4320	3600	
5	Total Bid	4488	5616	5640	
6					
7					

    b) The **Line Item Group** worksheet consolidates all Vendors responses on a Commodity Group basis. Vendors' Responses to each group will be group together and then sorted lowest price to highest price.

	A	B	C	D	E
2	Group No	Group Name	Vendor Name	Bid/No Bid	Group Total Cost
3	1	Men's buttons	PR Test 4	Bid	4488.00
4	1	Men's buttons	PR Test 5	Bid	5616.00
5	1	Men's buttons	PR Test 2	Bid	5640.00
6	2	Women's buttons	PR Test 4	Bid	0.00
7	2	Women's buttons	PR Test 2	Bid	0.00
8	2	Women's buttons	PR Test 5	Bid	0.00

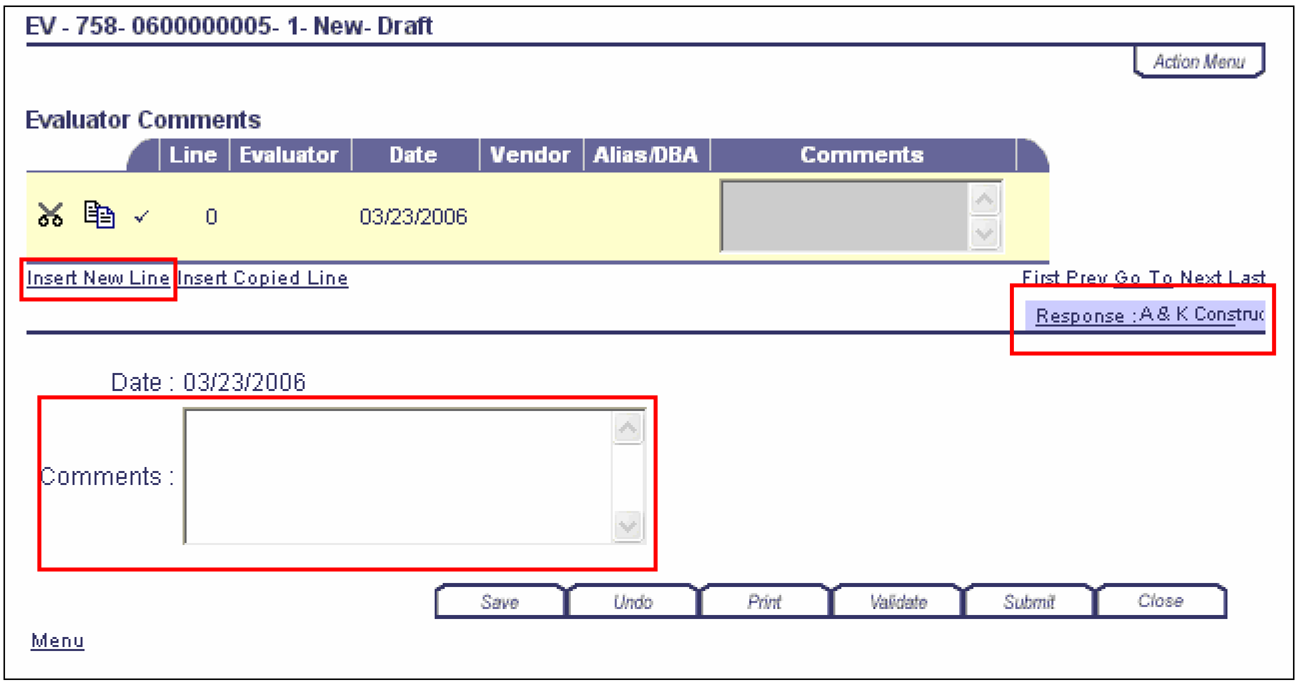
    c) The **Line Item** worksheet consolidates all Vendor Responses on a commodity line by commodity line basis. All responses to the same line item are grouped together and then sorted in ascending order i.e. lowest to highest.

Line #	Line Item Type	Vendor	Line Description	Bid Qty	Bid UOM	Unit Price	Line Item Tota
*							
1	Item	PR Test 5	US ARMY BUTTON-25 LINE (Mens)	12000.00000	EA	0.020000	240.00
1	Item	PR Test 4	US ARMY BUTTON-25 LINE (Mens)	12000.00000	EA	0.044000	528.00
1	Item	PR Test 2	US ARMY BUTTON-25 LINE (Mens)	12000.00000	EA	0.090000	1080.00
2	Item	PR Test 2	US ARMY BUTTON-30 LINE (Lady)	12000.00000	EA	0.080000	960.00
2	Item	PR Test 5	US ARMY BUTTON-30 LINE (Lady)	12000.00000	EA	0.088000	1056.00
2	Item	PR Test 4	US ARMY BUTTON-30 LINE (Lady)	12000.00000	EA	0.090000	1080.00
3	Item	PR Test 4	US ARMY BUTTON-36 LINE (Mens)	36000.00000	EA	0.080000	2880.00
3	Item	PR Test 2	US ARMY BUTTON-36 LINE (Mens)	36000.00000	EA	0.100000	3600.00
3	Item	PR Test 5	US ARMY BUTTON-36 LINE (Mens)	36000.00000	EA	0.120000	4320.00

15. Save the MS-EXCEL file to your Desktop. You may attach the Bid Tabulation to the Evaluation document for future reference. Close MS-Excel and return to the **EV** document.
16. From the **Document Templates** page, click the **Back** link to return to the **EV** document.

17. Click **Evaluator Comments** on the Secondary Navigation Panel. You must record an Award Justification for each Vendor receiving an award on the **Evaluator Comments** section prior to the creation of the award document. If a comment does not exist, you will receive an error message when you attempt to create the award document.

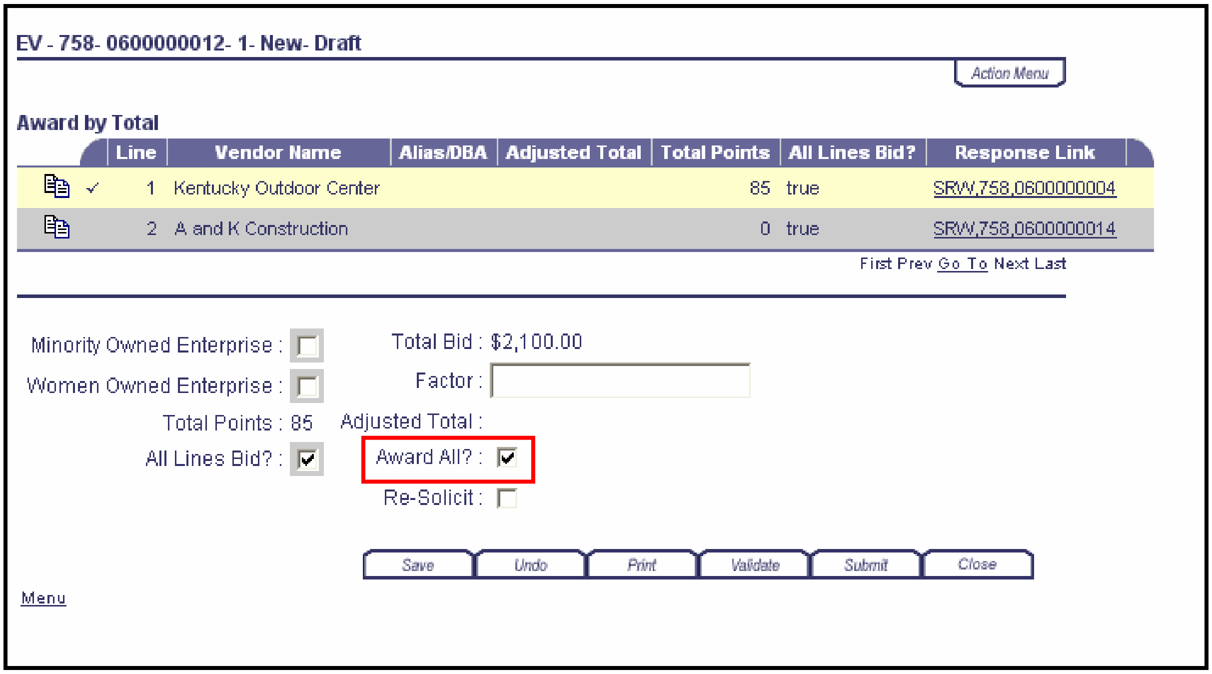
NOTE: When you initially transition to this page the Comments field will not be disabled. (e.g. you will be able to type information in that field. HOWEVER, the text will not be saved unless you have inserted a new line).



18. Click **Insert New Line** and enter the following required fields:

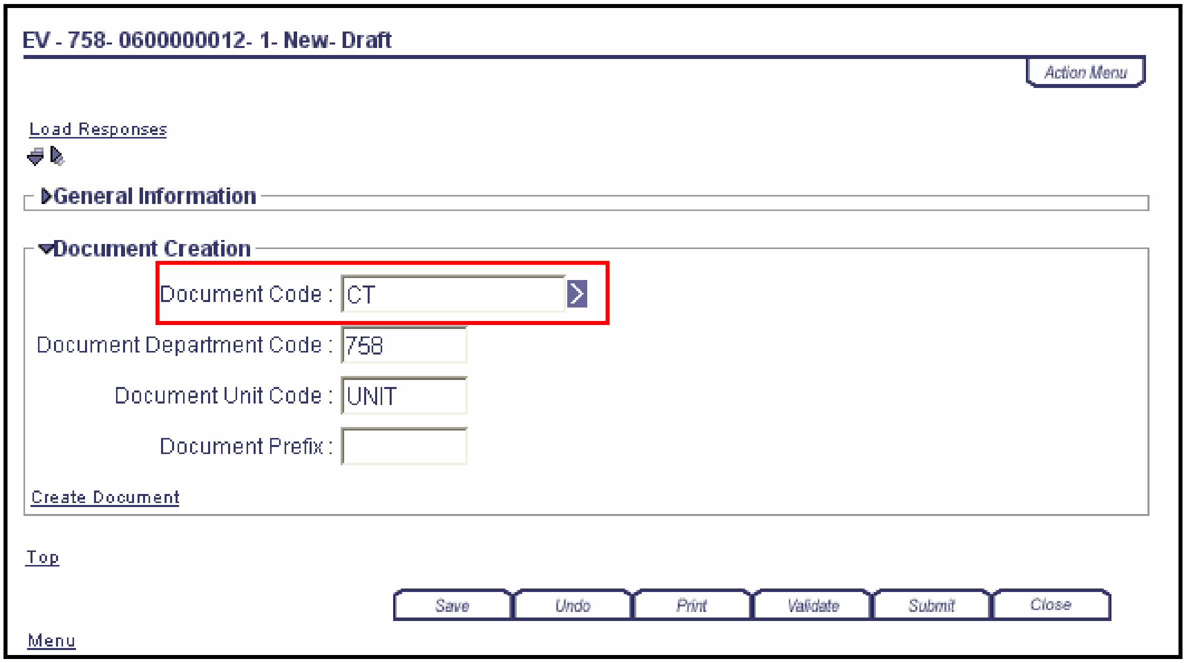
Required Fields	Values	
Comments	A & K Construction	Kentucky Outdoor Center
	Lowest Price for Buttons fastest delivery.	**Second best pricing.**

19. Click **Award by Total** link on the Secondary Navigation Panel.
20. Select **"A and K Construction"** Vendor in the grid section.
21. Enter the following required fields:



Required Fields	Values
Award All?	**Click to Select**
Re-Solicit	**Leave blank**
All Lines Bid?	**Leave checked**

22. Click **Header** on the Secondary Navigation Panel.
23. Expand the **Document Creation** section and generate the Award Document.



24. Enter the following required fields:

Required Fields	Values
Document Code	CT

25. Click **Create Document**

26. Click **Awarded Items** on the Secondary Navigation Panel. This view allows you to inspect how each line was awarded. You may open the generated documents by clicking the **Hyperlink Doc ID**.

> **NOTE**: If an item is deleted from a generated award it will correspondingly be deleted from this Inquiry.

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Action Menu

	Line	SO Commodity Line No	Award Link	Vendor Code	Vendor Name	Alias/DBA	Quantity Awarded	Contract Amount	Discount
✓	1	1	CT,758,0600000021	VC0000100005	PR Test 5		12000.00000	0.00	
	2	2	CT,758,0600000021	VC0000100005	PR Test 5		12000.00000	0.00	
	3	3	CT,758,0600000021	VC0000100005	PR Test 5		36000.00000	0.00	
	4	1	CT,758,0600000022	VC0000100004	PR Test 4		12000.00000	0.00	
	5	1	CT,758,0600000023	VC0000100002	PR Test 2		12000.00000	0.00	
	6	2	CT,758,0600000023	VC0000100002	PR Test 2		12000.00000	0.00	
	7	3	CT,758,0600000023	VC0000100002	PR Test 2		36000.00000	0.00	

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Please wait before going on with the exercise.

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7 – Contracts

The Contract is the centralized award document to be used by the Office of Material and Procurement Services (**OMPS**), Kentucky Transportation Cabinet (**KYTC**) and Department of Engineering and Contract Administration (**DECA**) for one-time purchases.

Contracts that are primarily for goods should be established on the **CT** document. Contracts that primarily for services should be established on the **CT2** document. These two documents are identical except that the **CT2** does not require a Receiver Document for payment to be initiated.

Contracts can either be created from the Procurement Workspace or can be generated from the Evaluation (EV) document.

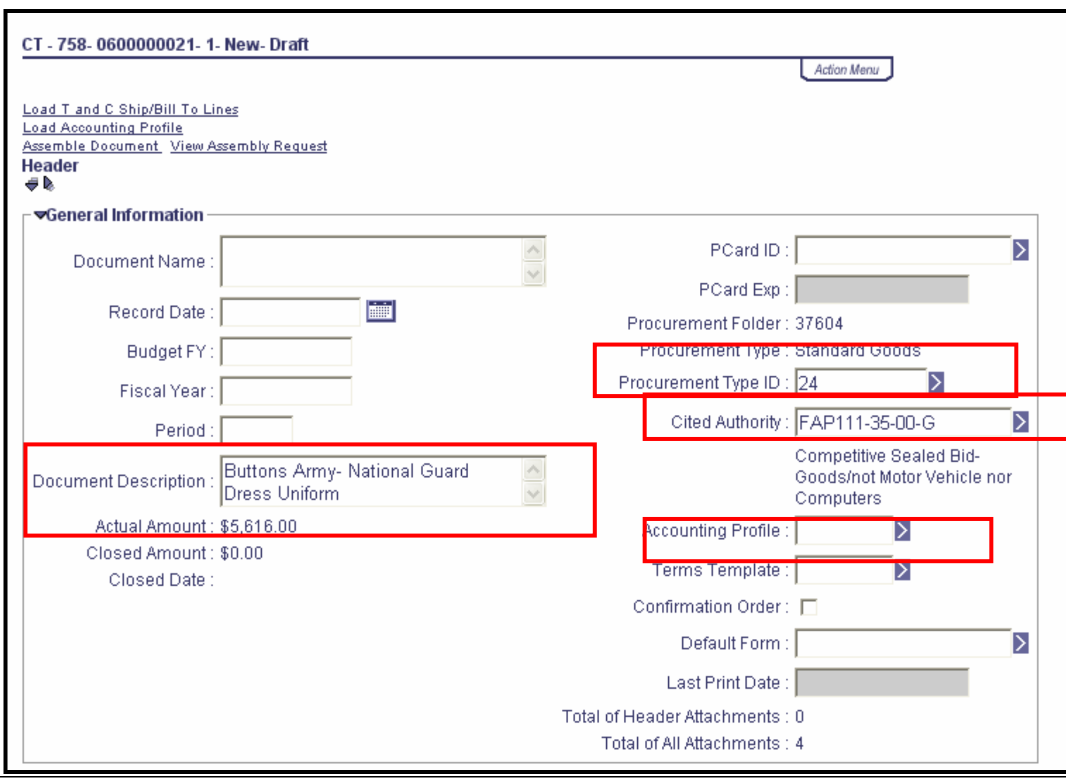
Contract Document

Once in the Awarded Items section of the **EV** document you can inspect how each line was awarded. You will open the generated document(s) by clicking the **Hyperlink Doc ID**.

Click the **Hyperlinked Doc ID** to open the **CT** document. The document opens in Draft status to the **Header** page. You will need to click **Edit** to insert information into the required fields.

NOTE: Most fields with in the document will be populated with the information from the Solicitation.

Complete the required and optional information in the Contract Header:



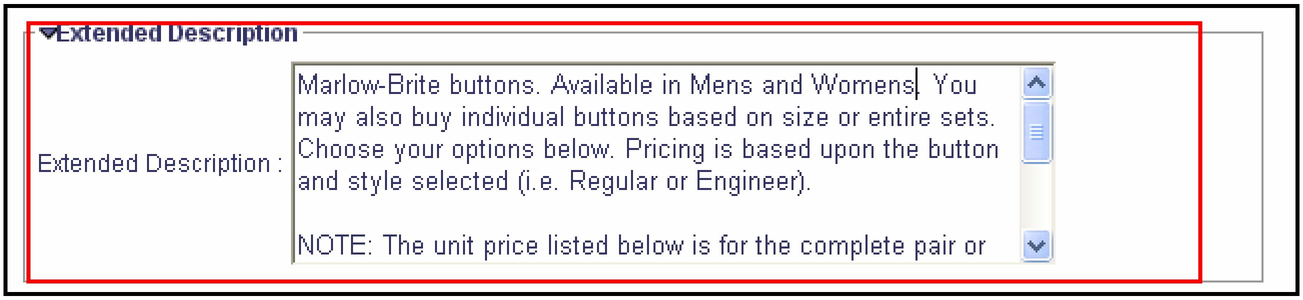
- The **Document Description** is required and will infer with the information from the Solicitation document. The description is also searchable from various inquiries like the Procurement Document Inquiry (**PRCUDOC**).
- Select a **Procurement Type ID** that corresponds to the business process being followed.
- The **Cited Authority** represents the authority which enables a user to enter the specific document for the amount specified on the document. This list is pre-filtered by your selection in the **Procurement Type** field.
- You may wish to select an **Accounting Profile** to populate the Accounting Distribution section. Once you have selected an **Accounting Profile**, click **Load Accounting Profile** to populate the **Accounting Distribution** section with the Accounting lines associated with the profile. The profile is comprised of one or more Accounting templates, which equate to a common coding string, or a single accounting line. You may also wish to establish the funding for the document by assembling a template or templates on the **Accounting Distribution** section, or entering the **Fund** and **Detail Accounting** information directly on the **Accounting Distribution** section, or on the commodity lines.

NOTE: Do not enter a **Budget FY**, **Fiscal Year**, or **Period**. They will be automatically populated for you when the document is submitted to final.

Complete the **Contact** section:

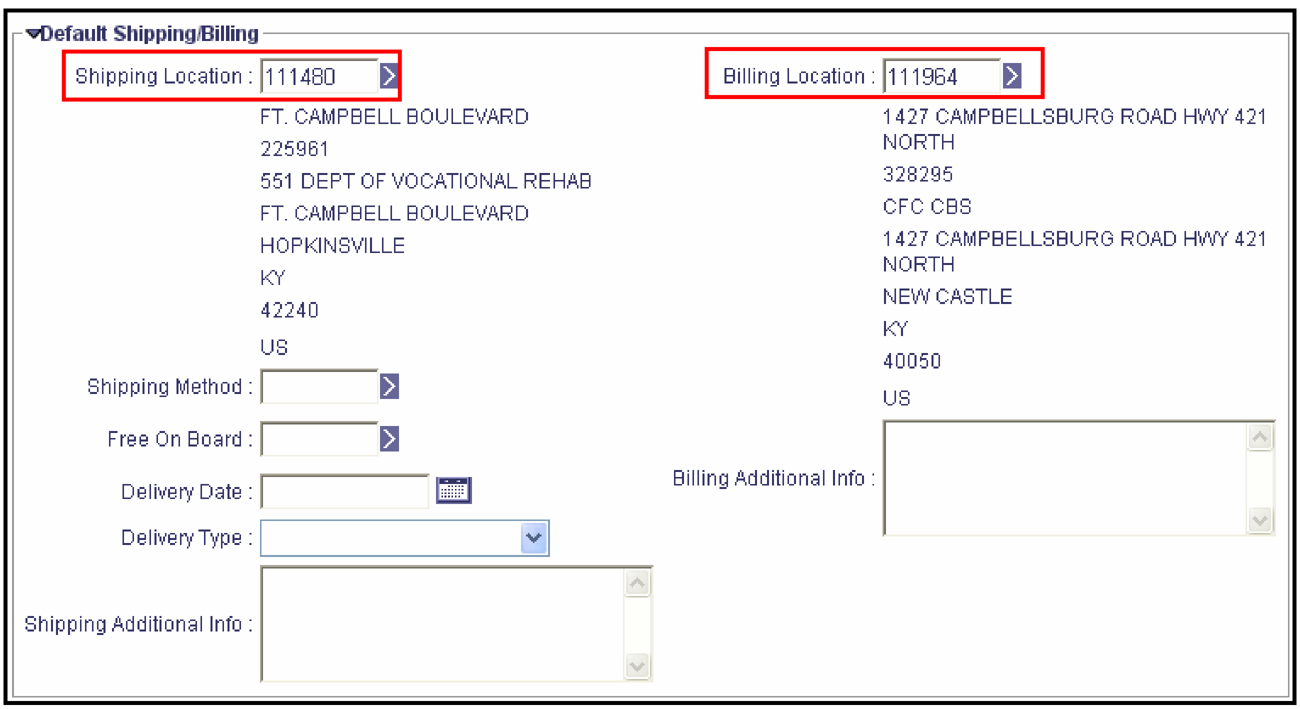
- The **Issuer ID** field will default to your information. If your are completing the document on someone else's behalf then pick their record from the pick-list by clicking on the **arrow** next to the **Issuer ID** field.
- The **Requestor ID** field will default to your information. The Requesting ID field is used to identify for whom the goods or services are being requested (e.g. who will actually be using the items or services on this contract. If your are requesting these items or services on someone else's behalf then pick their record from the pick-list by clicking on the **arrow** next to the **Requestor ID** field.

Complete the **Extended Description** Field (optional).



- The **Extended Description** field can be used to further describe the nature of the requirements being requested. This field can store up to 1500 characters of text. This field does not print.

Complete the **Default Shipping/Billing** section. If the same Shipping and Billing information should be used on all lines or most lines of the Purchase Order then complete this section. When you are creating Commodity line items you may click **<u>Ship/Bill To Lines</u>** to have this information automatically populated on the line item. (Optional)



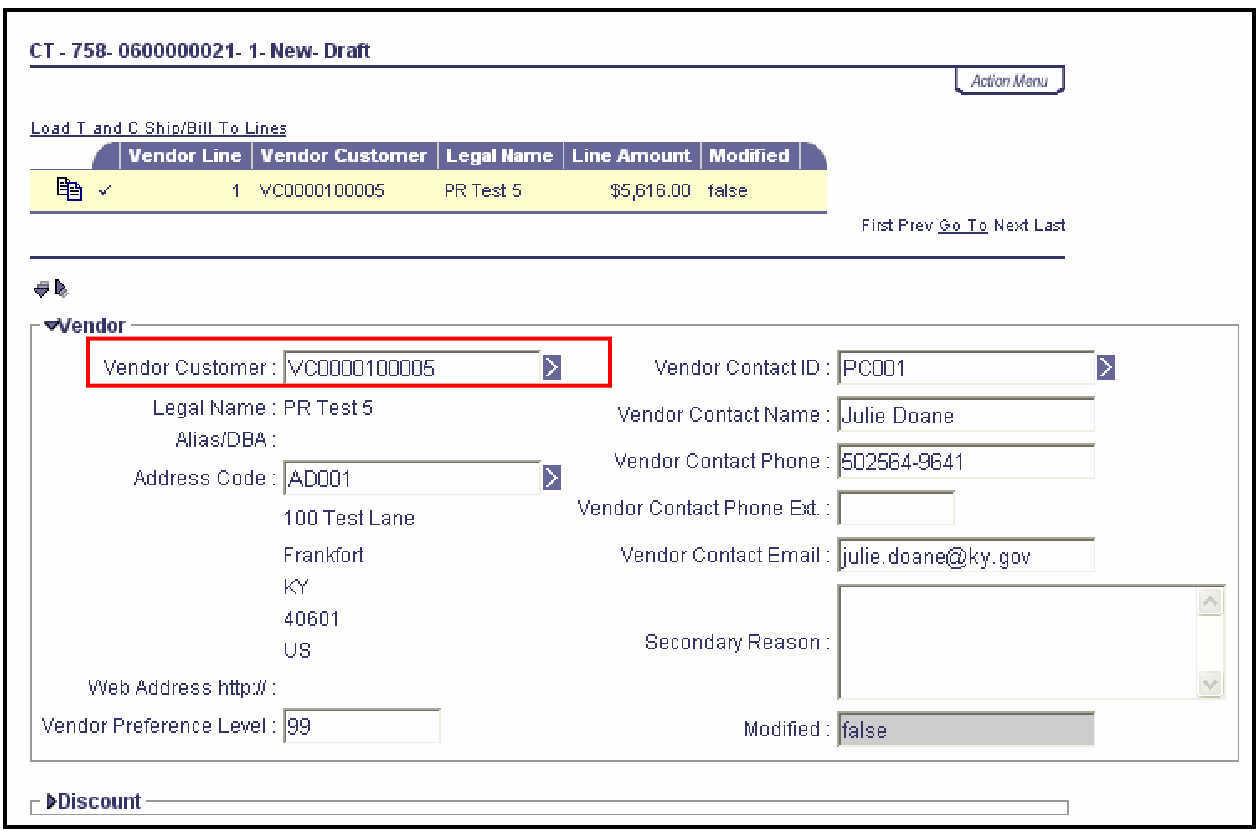
- The **Shipping Location** field is used to identify where the goods requested on the Requisition should be delivered. To select a Shipping Location click on the **<u>arrow</u>** next to the **Shipping Location** field to access the Shipping Location pick-list. If you already know the Shipping Location code you may record it directly in this field without accessing the pick-list. The

Shipping Location code, however, must be valid on the **Procurement Location** (**PLOC**) reference table.

- The **Shipping Additional Info** field is used to record any specific instructions about the packaging and shipping of the goods being requested. This field can store up to 1500 characters of text. This field does not print.
- The **Billing Location** field is used to identify where the Vendor's Invoice should be mailed. Click on the **arrow** next to the **Billing Location** field to access the Billing Location pick-list. If you already know the **Billing Location** code you may record it directly in this field without accessing the pick-list. The **Billing Location** code, however, must be valid on the **Procurement Location** (**PLOC**) reference table.
- The **Ship/Bill To Lines** link will automatically distribute the Shipping and Billing Locations to each existing Commodity line in the document. Your Commodity lines must be built prior to distributing the Shipping and Billing Locations.
- The **Delivery Date** field is used to enter the date by which you will need the goods being requested to be delivered.

NOTE: Do not complete the **Shipping Method**, **Free on Board, Shipping additional information, Billing Additional Information** and **Delivery Type** fields. These fields are not required. These fields do not print-out.

Inspect the **Vendor** Section. The Vendor information is inferred from the Evaluation document.

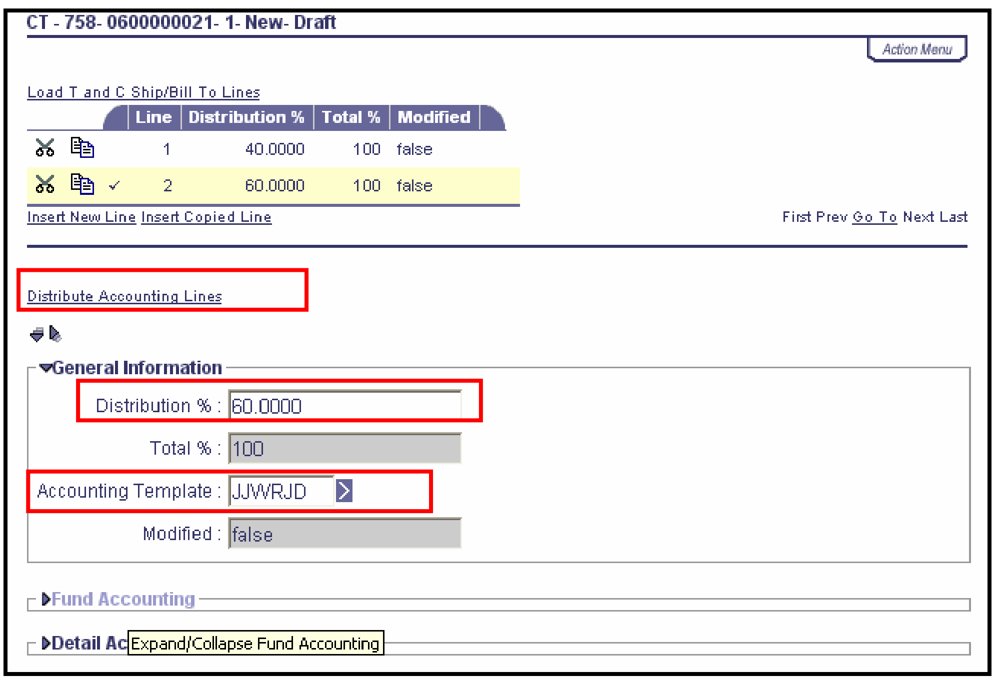


Complete the **Accounting Distribution** Section. The **Accounting Distribution** panel is used to build a list of Accounting lines with a given percentage of distribution for the purpose of applying that distribution to each Commodity line automatically.

Once you have entered the initial set of Accounting lines, the system can automatically replicate these Accounting lines for each of the commodities. Based on the percentages associated with each of the Accounting lines, the system also automatically calculates the correct funding.

When a distribution has been built on this panel and the document is validated, the **Distribute Accounting Lines** link will be available. Clicking on this link will apply the listed Accounting lines to each commodity line. Clicking **Distribute Accounting Lines** will overwrite any pre-existing Accounting lines. Clicking this link prior to the completion of the Commodity lines will result in no activity. There must be Commodity lines in place to distribute the Accounting Lines.

NOTE: The **Accounting Distribution** panel is **not** a document level summary of the Accounting lines associated with all Commodity Lines. It is a method of distributing a common accounting string or strings to all Commodity lines on the document.



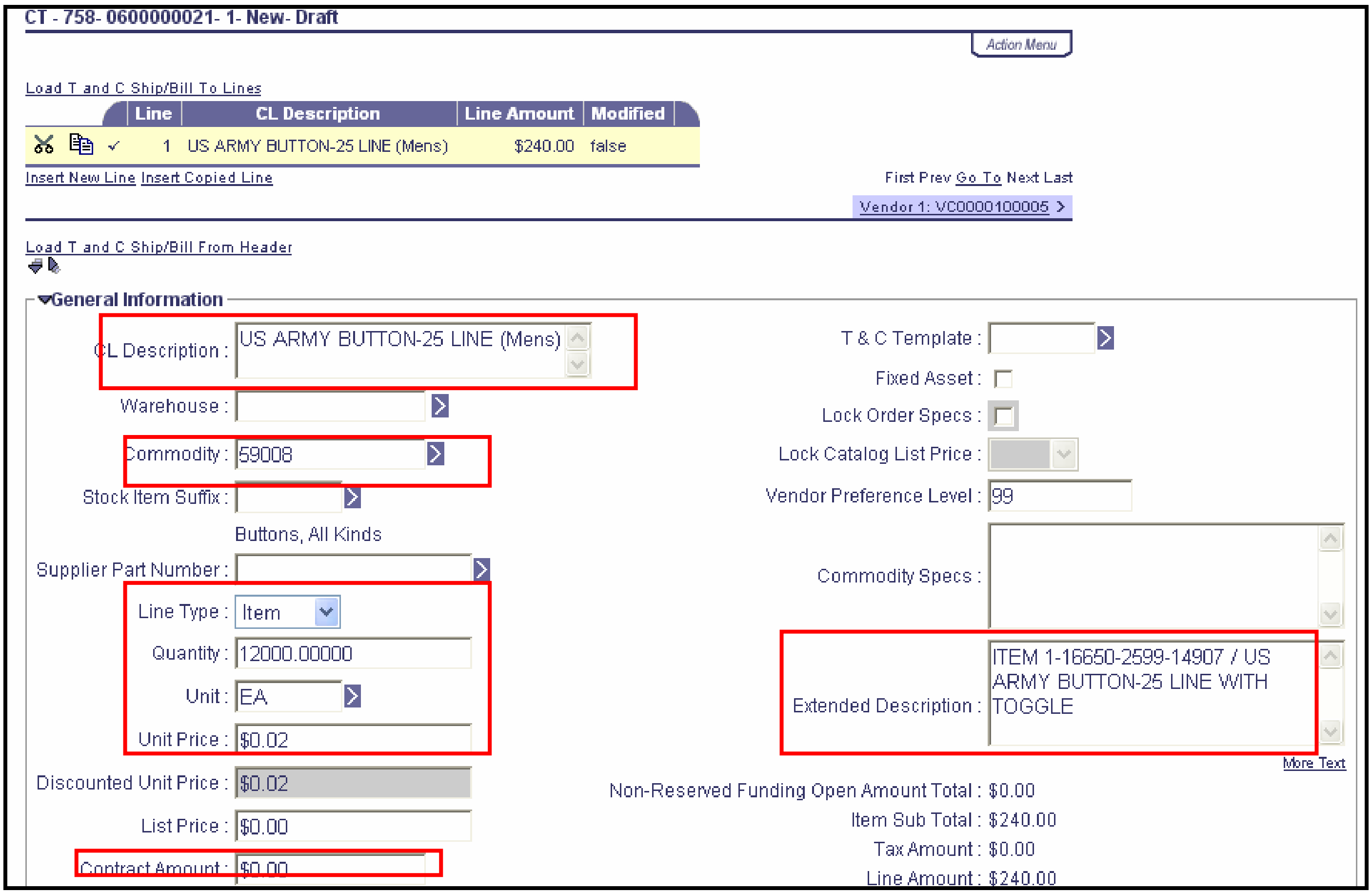
- For each line in the distribution, an **Accounting Template** may be selected. If selected then accounting elements associated with the template will populate the **Fund Accounting** and **Detail Accounting** sections.
- For each line in the **Accounting Distribution**, a **Distribution %** must be assigned. The percentage should be entered as a number between 0 and 100 with a maximum of four decimal places. The sum of all distribution percentages for all lines in the distribution must equal exactly 100.

- If an Accounting Template is not being used then the individual accounting elements must be specified in the **Fund Accounting** and **Detail Accounting** sections.

NOTE: eMARS does not validate the accounting elements being recorded in this section. Validation does not occur until the lines have been distributed to the Commodity lines.

Inspect the **Commodity** section. The **Commodity** section of the Contract is used to list all distinct goods or services being requested. This information will infer from the Solicitation document but can be modified.

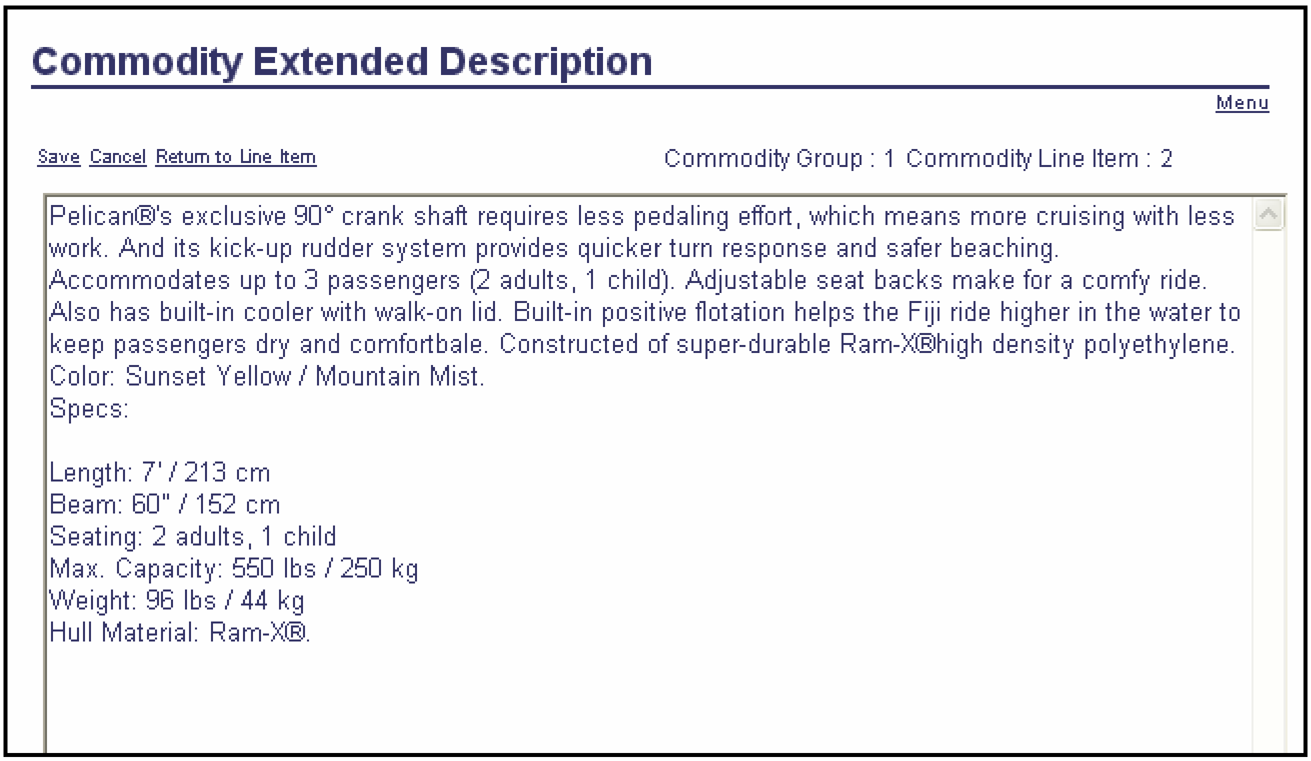
Inspect the General Information section:



- The **CL Description** field is used to record a brief description of the good or service being requested. This field does print-out on all documents and is used on subsequent Procurement Documents. This field is displayed in the grid area of the Commodity section in order to help you identify which line you would like to inspect or modify.
- The **Commodity** field is used to store the **NIGP** commodity code that most closely matches the item or service being purchased. This field is used primarily for classification purposes. When creating a Contract it is important to make the first commodity the one that is most relevant to

the Contract as a whole. The first commodity code is used by EMARS to determine which office will receive the Contract for processing.

- The **Line Type** field is used to select how the cost of the line item will be established. Generally speaking, goods should be recorded with a **Quantity**, **Unit of Measure** and **Unit Price** and Services should be entered as **Contract Amount**.
    - When you know the **Unit Price** a **Line Type** of "**Item**" should be selected. The **Unit of Measure**, **Unit Price**, and **Quantity** are required.
    - If the unit cost is unknown or not applicable the lump sum cost of the line should be recorded in the **Contract Amount** field. In this case a **Line Type** of "**Service**" should be selected. When the **Line Type** is Service then the **Service From** and **Service To** dates are required. These dates are the effective dates for resultant award document.
- The **Extended Description** field is used to provide a detailed description of the desired item. Up to 4000 characters of information can be stored in this field. To access a larger field in which to type the extended description click on the **More Text** link.



Complete the **Shipping**/ **Billing** information section.

- The **Shipping Location** field is used to identify where the goods requested on the Requisition should be delivered. Click on the arrow button next to the **Shipping Location** field to access the Shipping Location pick-list. If you already know the Shipping Location code you may record it directly in this field without accessing the pick-list. The Shipping Location code, however, must be valid on the **Procurement Location** (**PLOC**) reference table.

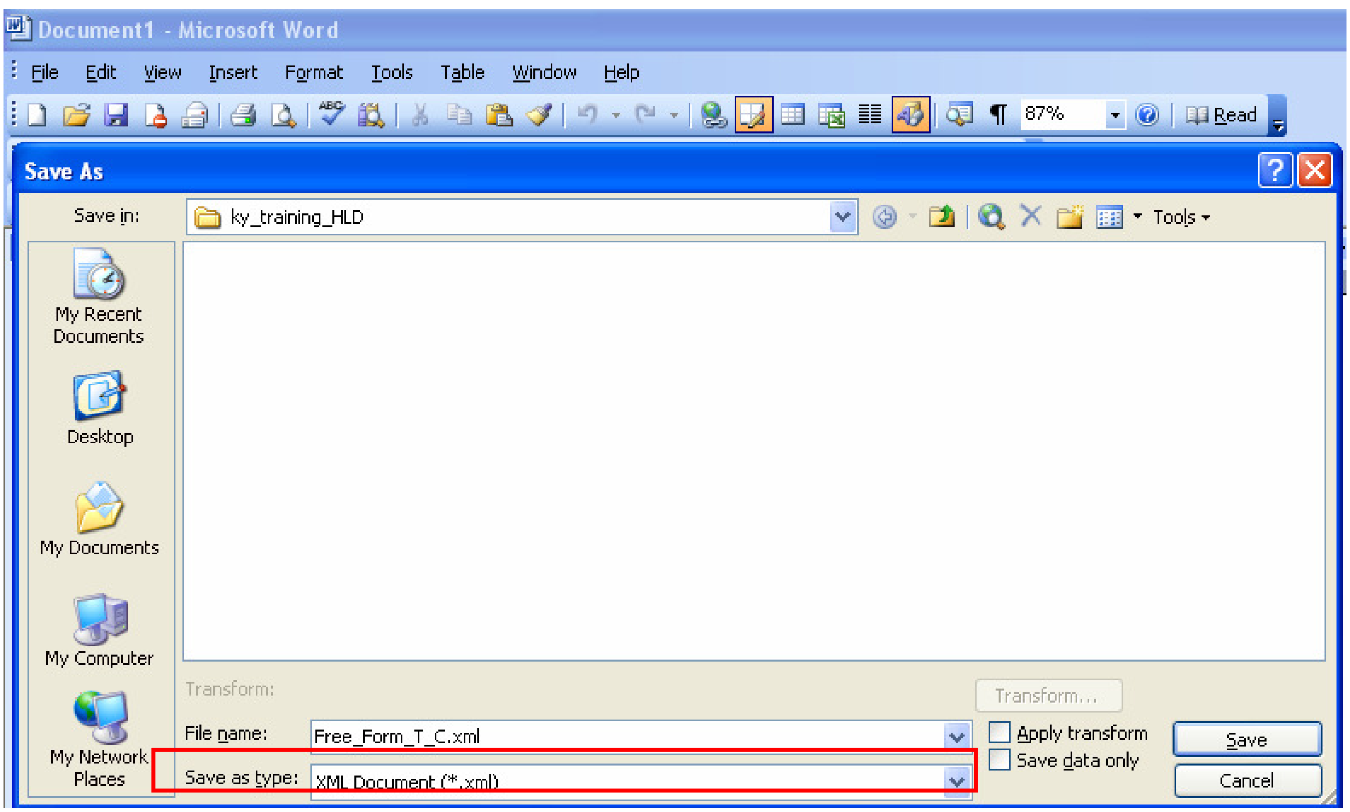
- **The Billing Location** field is used to identify where the Vendor's Invoice should be mailed. Click on the arrow button next to the **Billing Location** field to access the Billing Location pick-list. If you already know the Billing Location code you may record it directly in this field without accessing the pick-list. The Billing Location code, however, must be valid on the **Procurement Location** (**PLOC**) reference table.

Inspect the **Terms and Conditions** section of the document.

The **Terms and Conditions** panel lists all the Terms and Conditions that will be assembled into the Final Version of the Contract. This section will infer with the Terms and Conditions from the Solicitation and should be updated with the most current Terms for the purchase.

NOTE: If Free Form Terms and Conditions were used in your Solicitation document, the attachment will not infer to your contract. The attachment will need to be modified and uploaded into the section.

- The MS-Word documents that you would like to include must be saved in MS-Word as **.XML** before they can be attached.



.

When editing your file to attach please observe the following rules:

Do's:

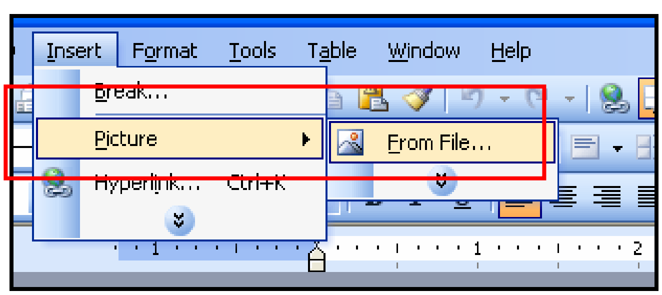
- Do ensure you are utilizing Word 2003 before attempting to edit **T&C**.
- Do set your top margin of your Word Document to 1.5.
- Do save the document as an .**XML** file.
- Do add Supporting Documents when necessary. These documents must also be in .**XML** format, but they will appear below the **Terms and Conditions** when the document is assembled. If multiple attachments are used, there will be a page break between each attachment. If you insert a line accidentally, you need to delete it by using the scissor icon.
- Do use "Normal" formatting for all text.
- Do use "Grid" formatting for all tables.
- Do clear all formatting, and then reformat your bolding, bullets, and justifications if using an existing document for the first time.
- Do select the "Free" **T&C**, then delete the attached file and upload your .**XML** document. If you have inserted a link to a picture(s) in your document, you must upload the picture file(s) after you have uploaded the .**XML** file.
- Do attach any type of document, regardless of file type in the **Header** section.

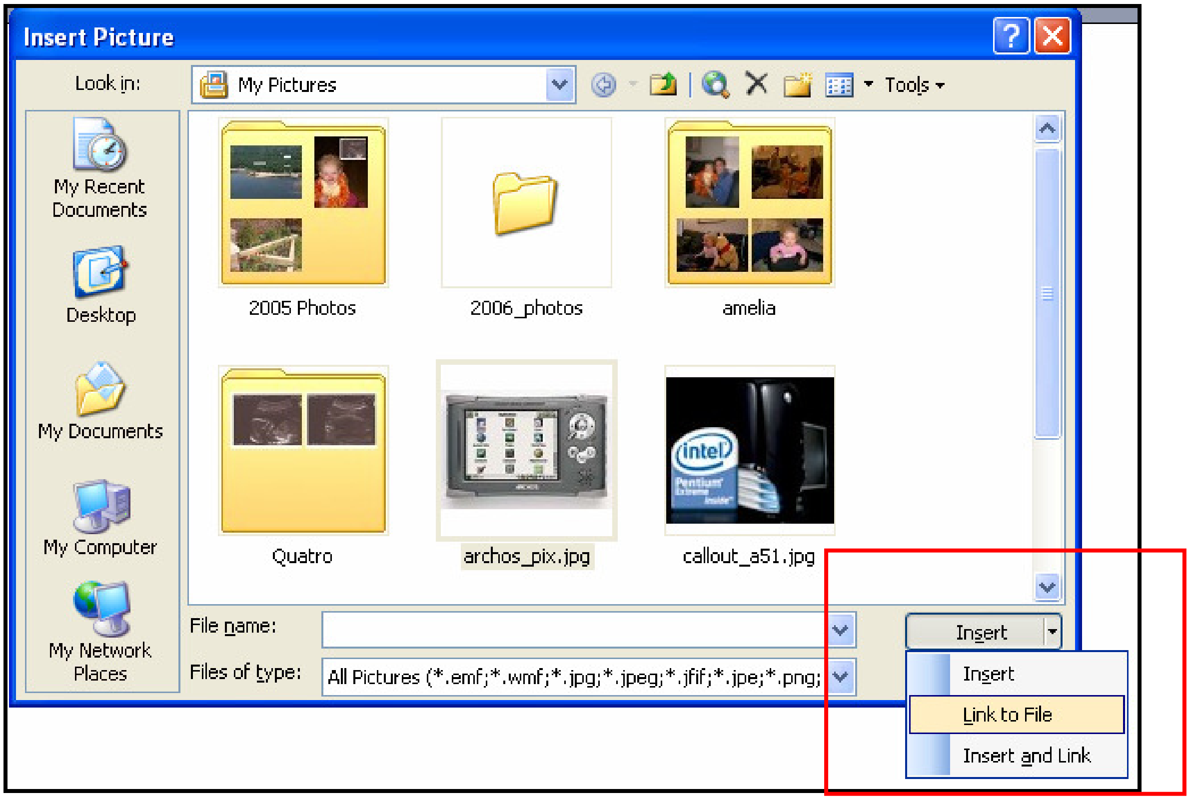
Don'ts

- Don't use Section breaks – the assembly process stops at the first section break.
- Don't use Page breaks – these are ignored in the assembly process.
- Don't use Track Changes.
- Don't add **Terms and Conditions** to the Commodity **T&Cs** section – add to the **Terms and Conditions** section only.
- Don't insert blank lines in the **Supporting Documents** section.
- Don't insert objects directly into the document.
    - If you have a picture, you must insert as a link to the file.

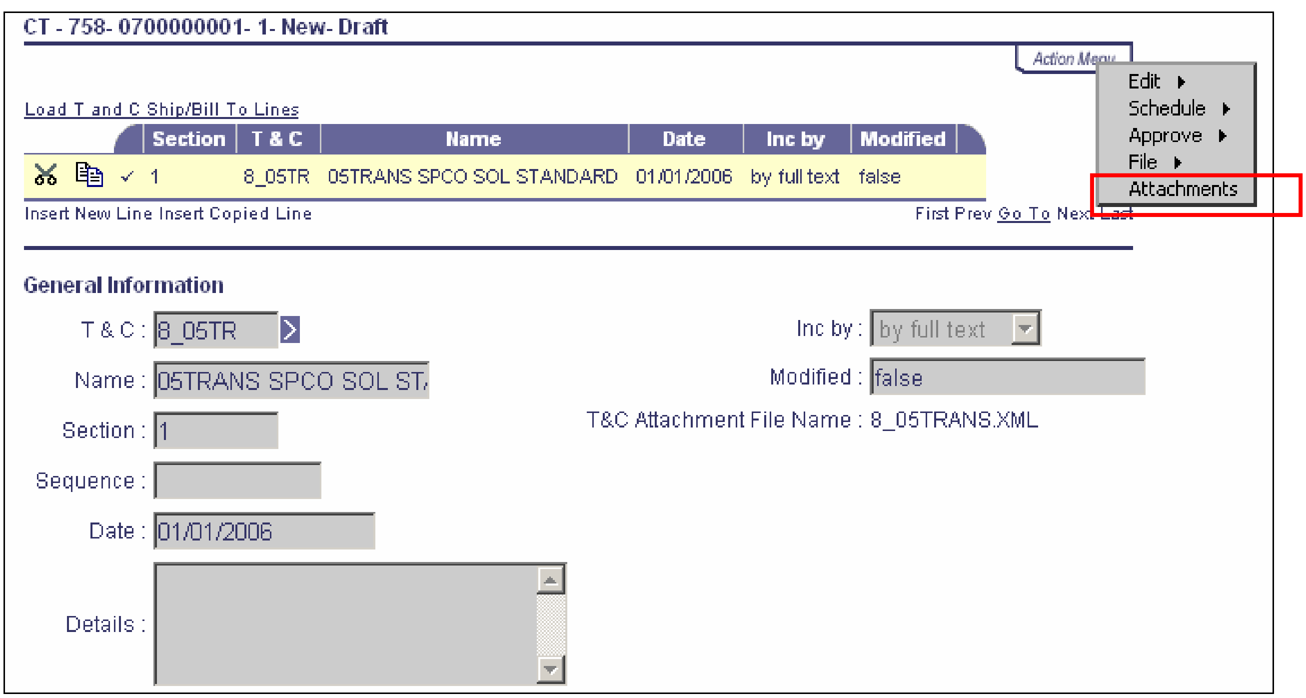
Attach any documents as **Supporting Documents** or in the document **Header** section.

- If you would like to use images in the file do not paste the image directly into the file. Insert the picture into the file as a "link" only.
- If your file has multiple images they must be packaged together in a .zip file. The attachment type for these files is called "image zipped".

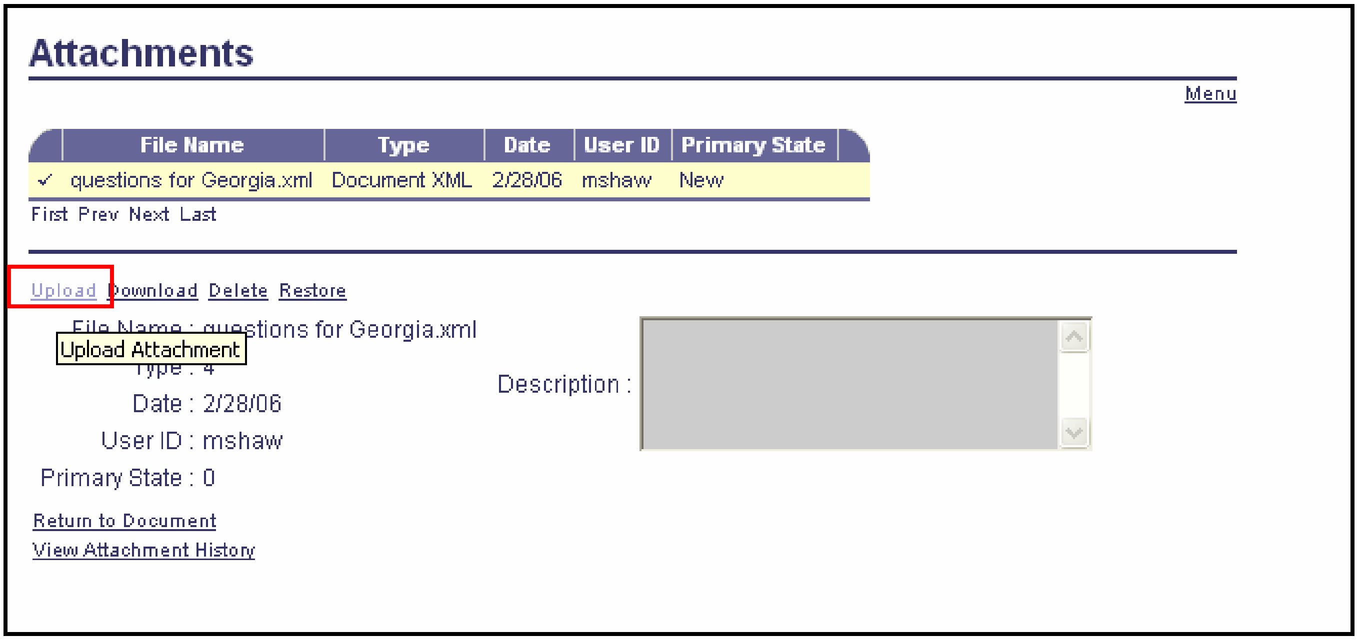




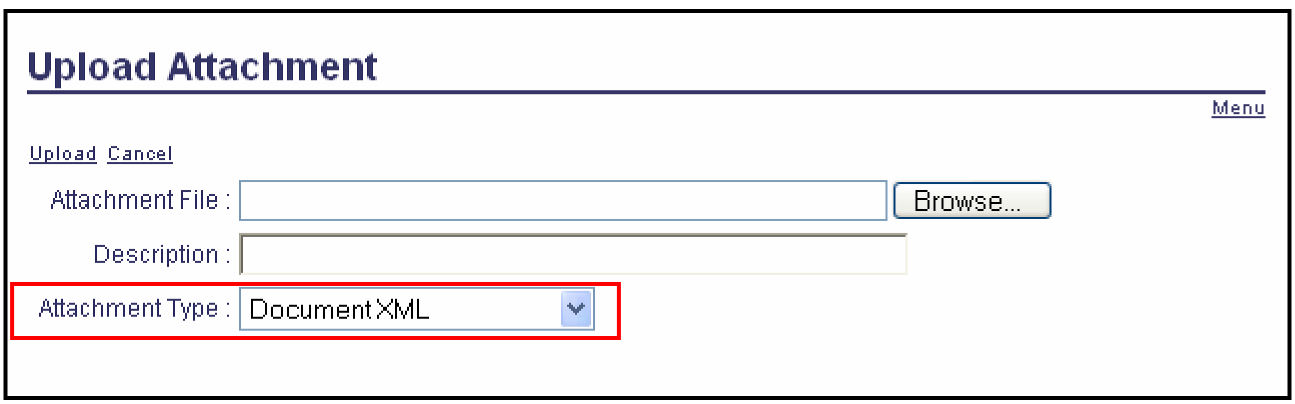
When you upload the **.XML** file to eMARS you must upload the pictures as a separate attachment to the Terms and Conditions.



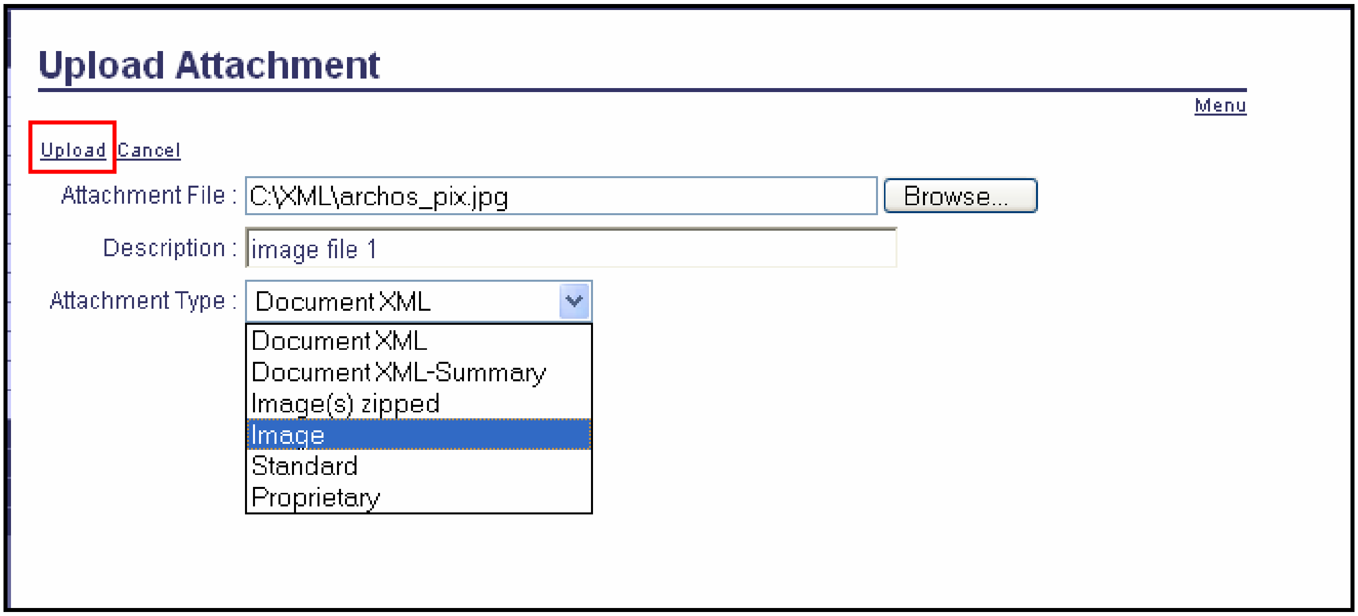
From the Attachment page click **Upload**.



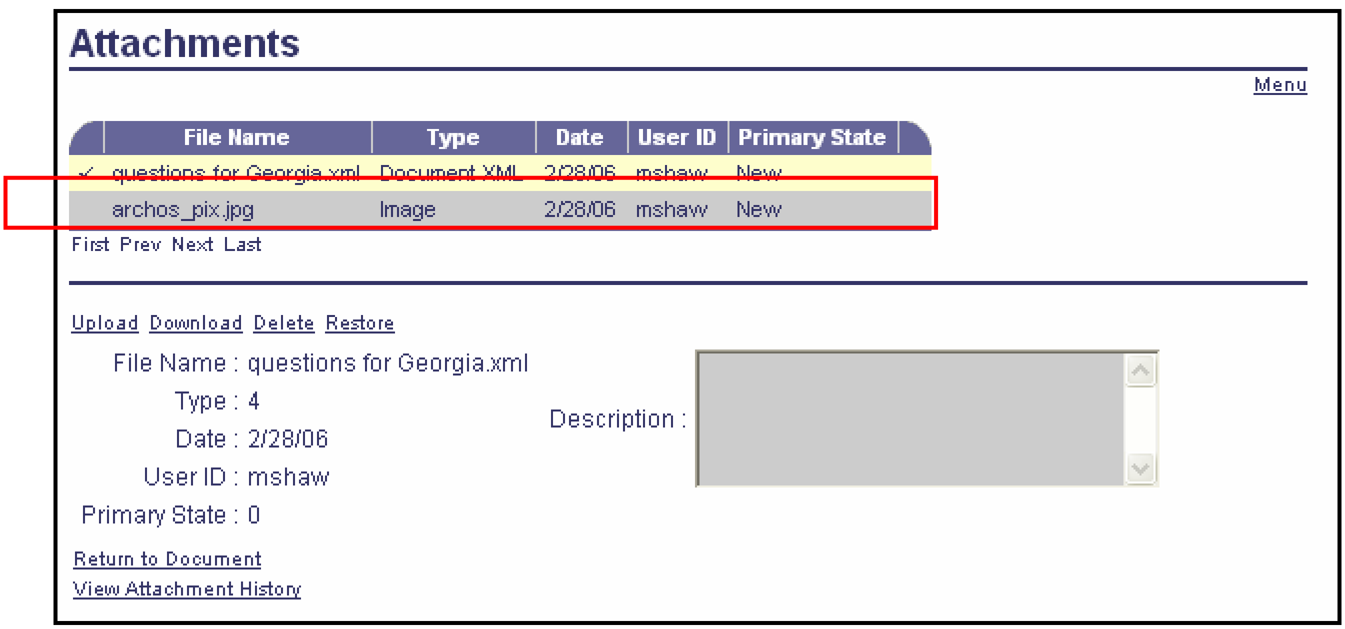
On the Upload page click on **Browse** to find the image file.



Select the **Attachment Type** of “image” and type in a brief **Description.** If you are uploading multiple pictures please zip the pictures into a single file and select the “Image(s) zipped” option. Click on the **Upload** link.



After the Upload action has completed successfully, you will be transitioned to the Attachments page where you will see the image attachment listed. Click on the **Return to Document** link.



Click **Validate** to check for errors.

To Assemble:

1 From the Header Section click on **Assemble Document**
2 Click **Submit Assemble Request**
3 Click on **Refresh**, You should see the status as Successful (You may have to click refresh a few times before the assembly job finishes and you see a Successful Status).
4 Click **Back** to return to the document

To Print the Assembled Form:

1 Return to **Header**
2 From the **Action Menu**, select **Attachments**.
3 Click **Download**.

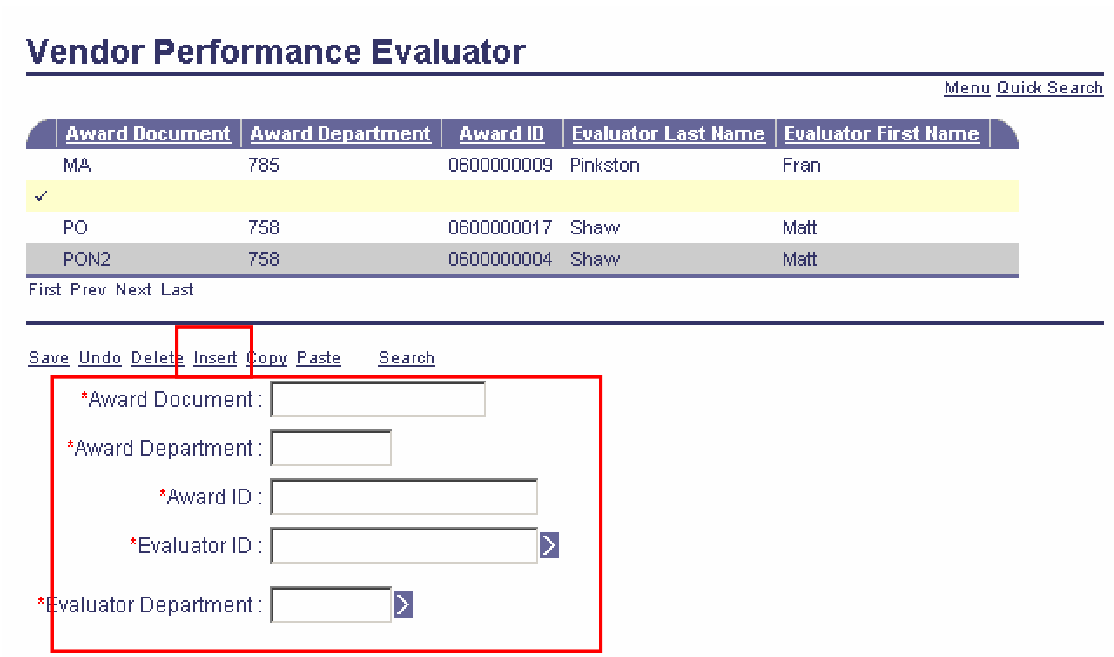
While the **PDF** document is open use the File Menu Options to either print or email the document.

Return to the eMARS application by closing out the **PDF** file. Once in the Attachments page click **Return To Document** to return to the Contract **Header**.

Submit the Contract to initiate workflow for approval.

Navigate to the Performance Evaluator Table by clicking on the **Home** action button, click on **Search** and click on **Page Search**. Enter **PEEVALR** into the **Page Code Field** and click **Browse.** Click on **Vendor Performance Evaluator** to open the page.

Click **Insert** to add a new row to the table.



- In the **Award Document** field, enter the **<u>Document Code</u>** on the document for which you wish to establish the Evaluator information.
- In the **Award Department**, enter the **<u>Department</u>** shown on the Document Header of the document for which you wish to establish the Evaluator information.
- In the **Award ID**, enter the **<u>Document ID</u>** of the Contract Award just submitted.
- In the **Evaluator ID** field, enter your **<u>ID</u>** from the pick list, and
- In the **Evaluator Department**, enter the **<u>Department</u>** for the Evaluator entered in the Evaluator ID field.

Multiple rows may be entered for as many evaluators as are necessary for each award.

Exercise 4 – Process a Contract from an Evaluation

Scenario

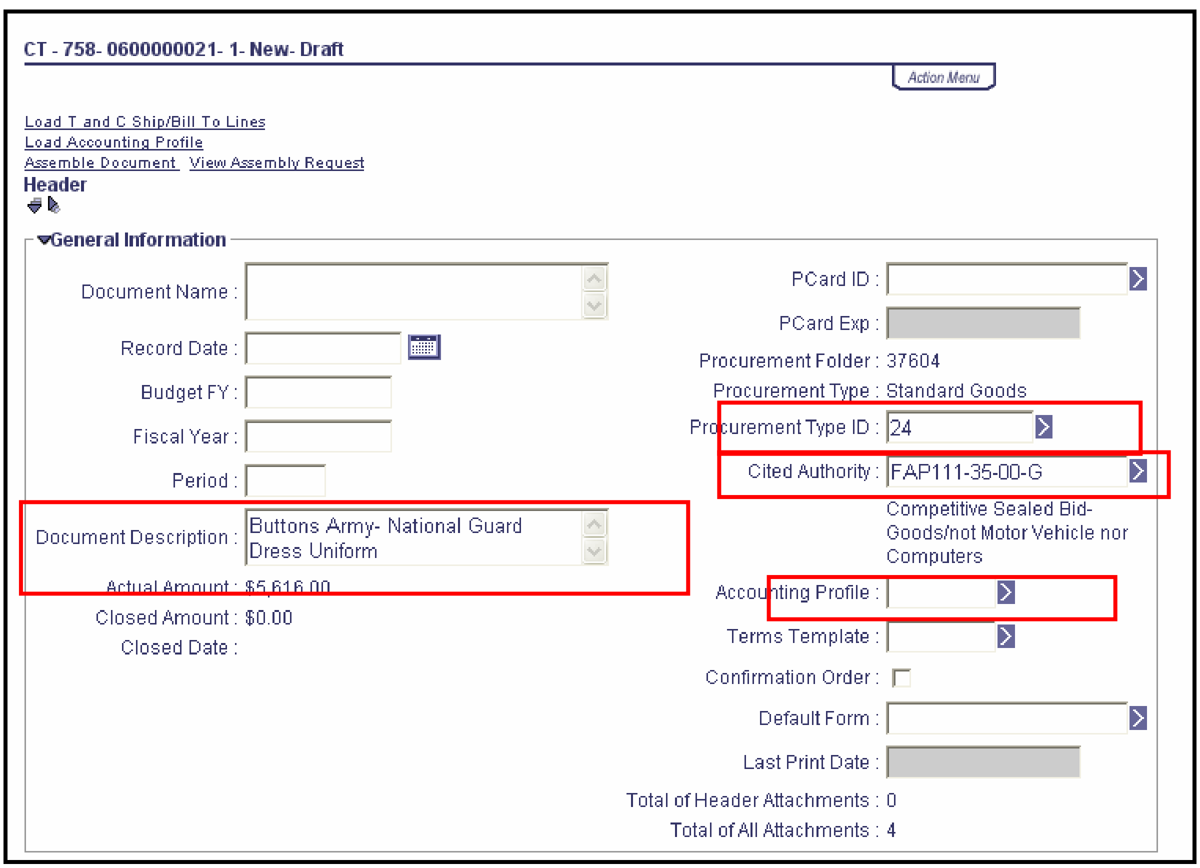
You need to establish a Contract with a Vendor to provide dress buttons for Kentucky's National Guard uniforms.

Task Overview

Create a Contract (**CT**) document from the Evaluation (**EV**) document you created in Exercise 3. You will modify the Terms and Conditions and add Accounting lines for the Commodity lines that have been awarded to the Vendor selected in the Evaluation (**EV**) document.

Procedures

1. Access **Evaluation Document** you created in Exercise 3.
2. Click **Awarded Items** on the Secondary Navigation Panel. This view allows you to inspect how each line was awarded. You may open the generated documents by clicking the **Hyperlink Doc ID**.
3. Click the Award link to open the CT document just created in the EV. The CT opens to the Header Section.
4. Click **Edit** at the bottom of the page to add the required fields

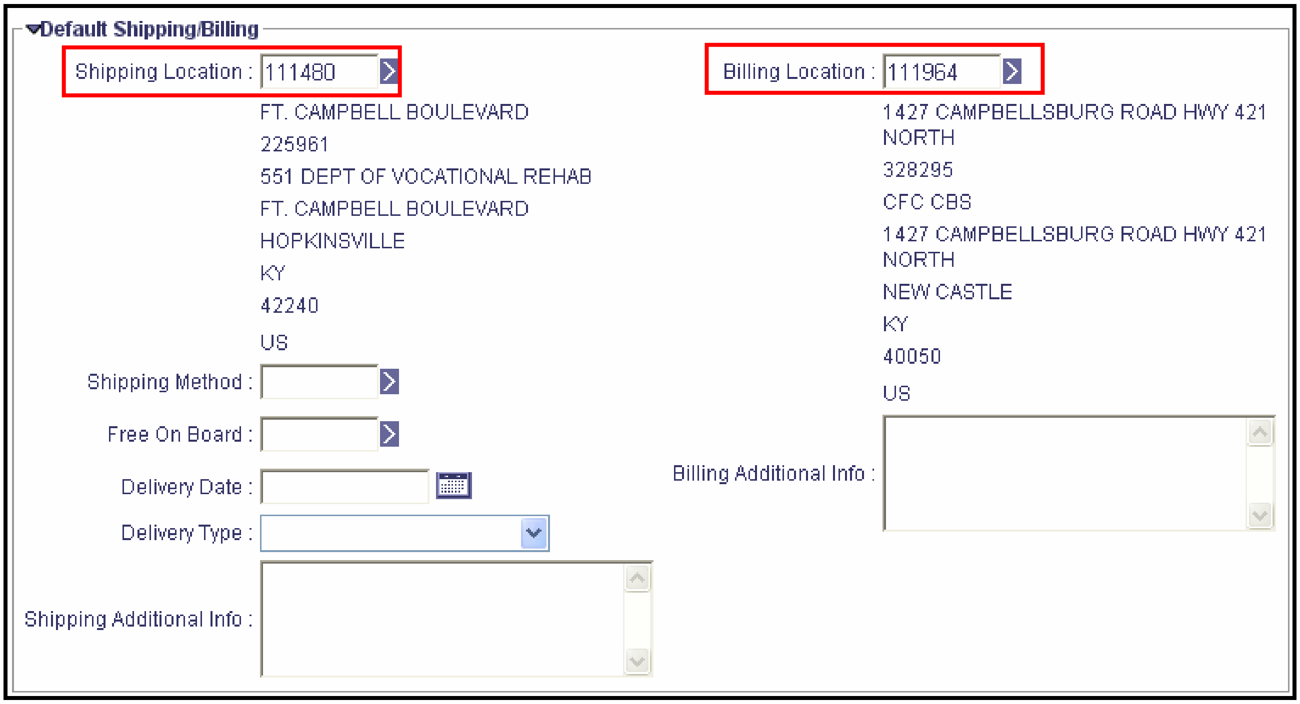


Complete the following required fields in the General Information section of the Header:

Required Fields	Values
Accounting Profile	**Select the Accounting Profile from your Student Card** Click **Load Accounting Profile** to populate the Accounting Distribution section
Procurement Type	**24** Select from the Pick List
Cited Authority	**FAP 111-35-00-G**
Budget FY	Leave blank.
Fiscal Year	
Period	

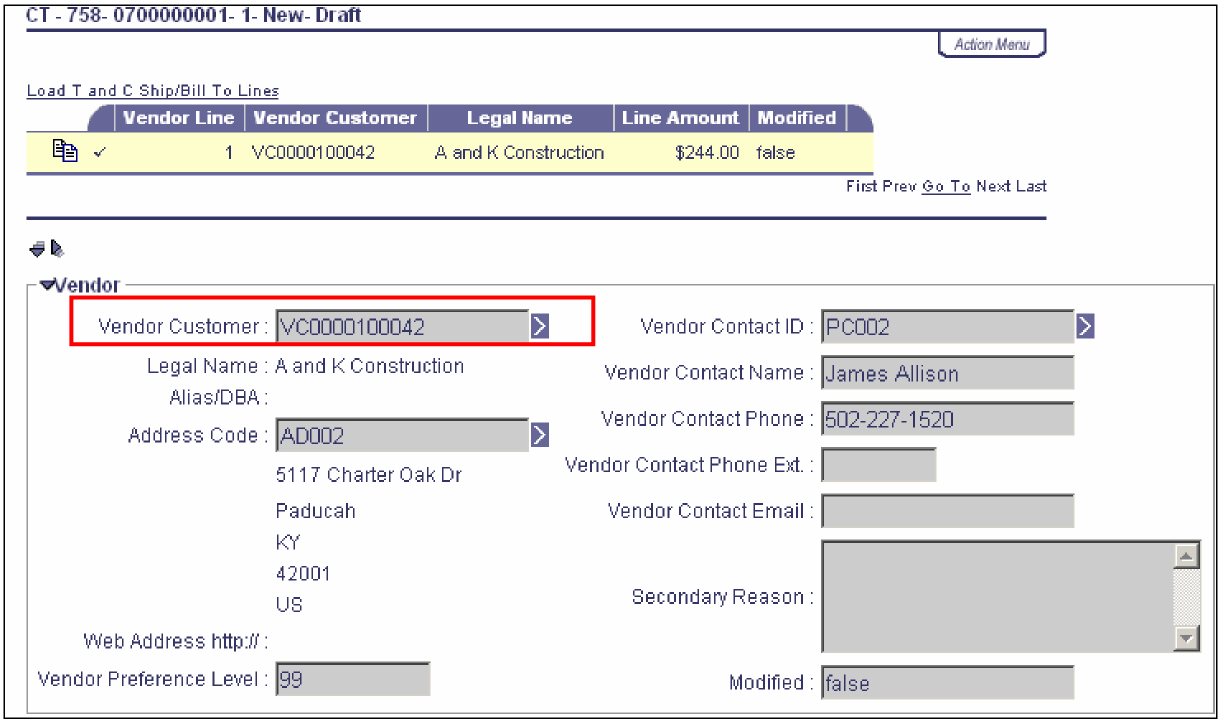
5. Open the **Contact** Section and note that the information defaulted from the Evaluation (**EV**) document.

6. Complete the **Default Shipping/Billing** Section. If the same Shipping and Billing information should be used on each line of the Contract then complete this section. When you are creating commodity line items you may click **Ship/Bill To Lines** to have this information automatically populated on the line item. (Optional)

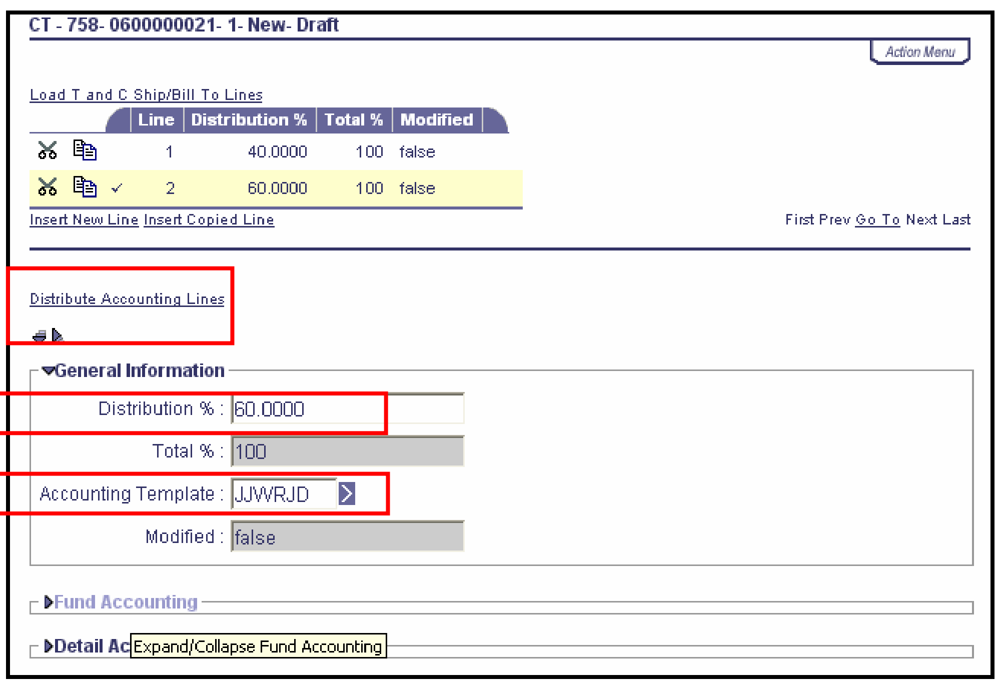


Required Fields	Values
Shipping Location	Select the Shipping Location from your Student Card
Billing Location	Select the Billing Location from your Student Card
Delivery Date	Leave blank
Shipping Method	Leave blank
Free on Board	
Shipping Additional Information	
Billing Additional Info	
Delivery Type	

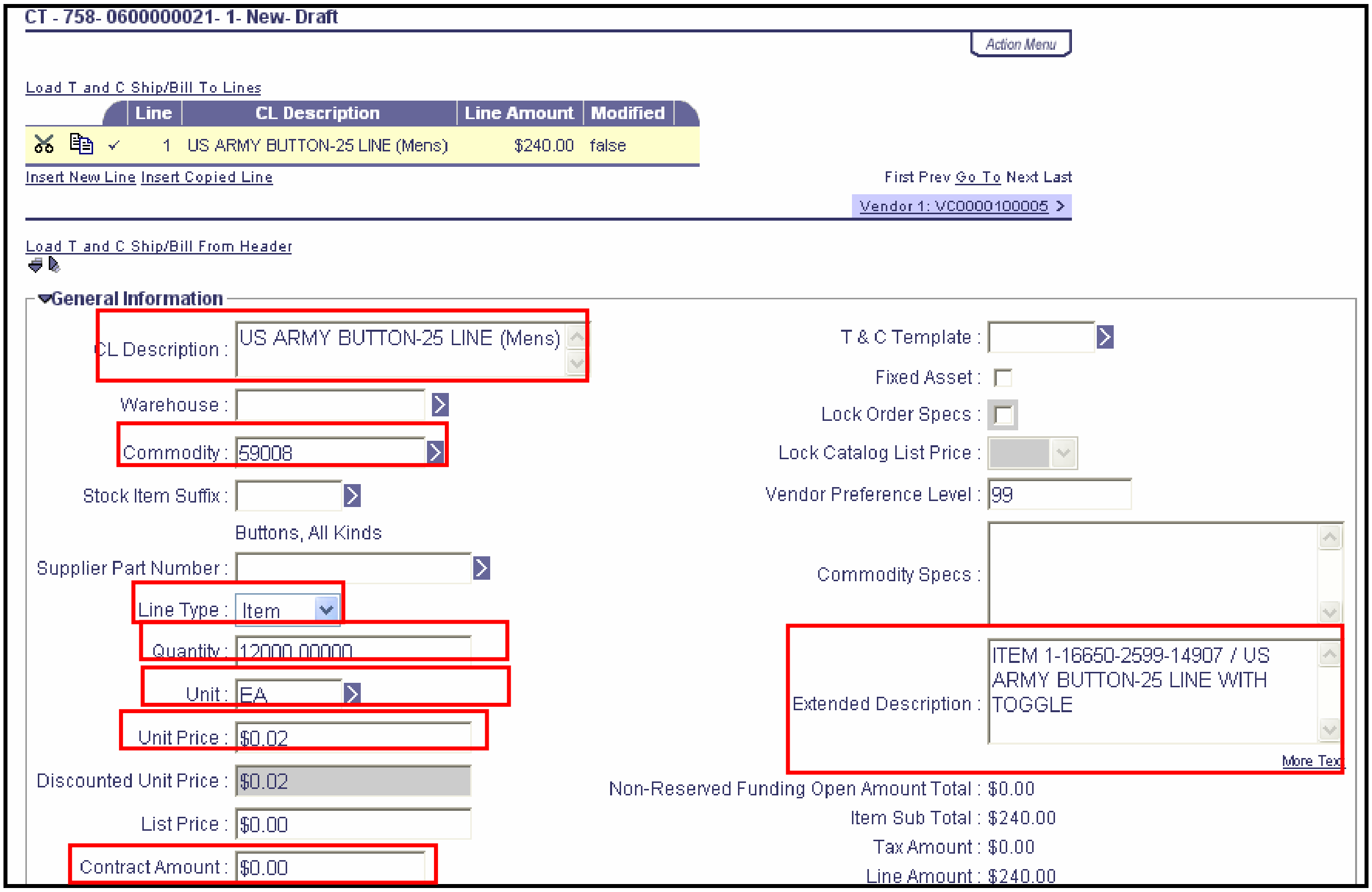
7. Click **Vendor** on the Secondary Navigation Panel. To view the Vendor information that defaulted from the Evaluation (**EV**) document.



8. Click **Accounting Distribution** on the Secondary Navigation. Verify that your profile has been loaded. If not, return to the header and Load Accounting Profile. Distribution must be 100%.

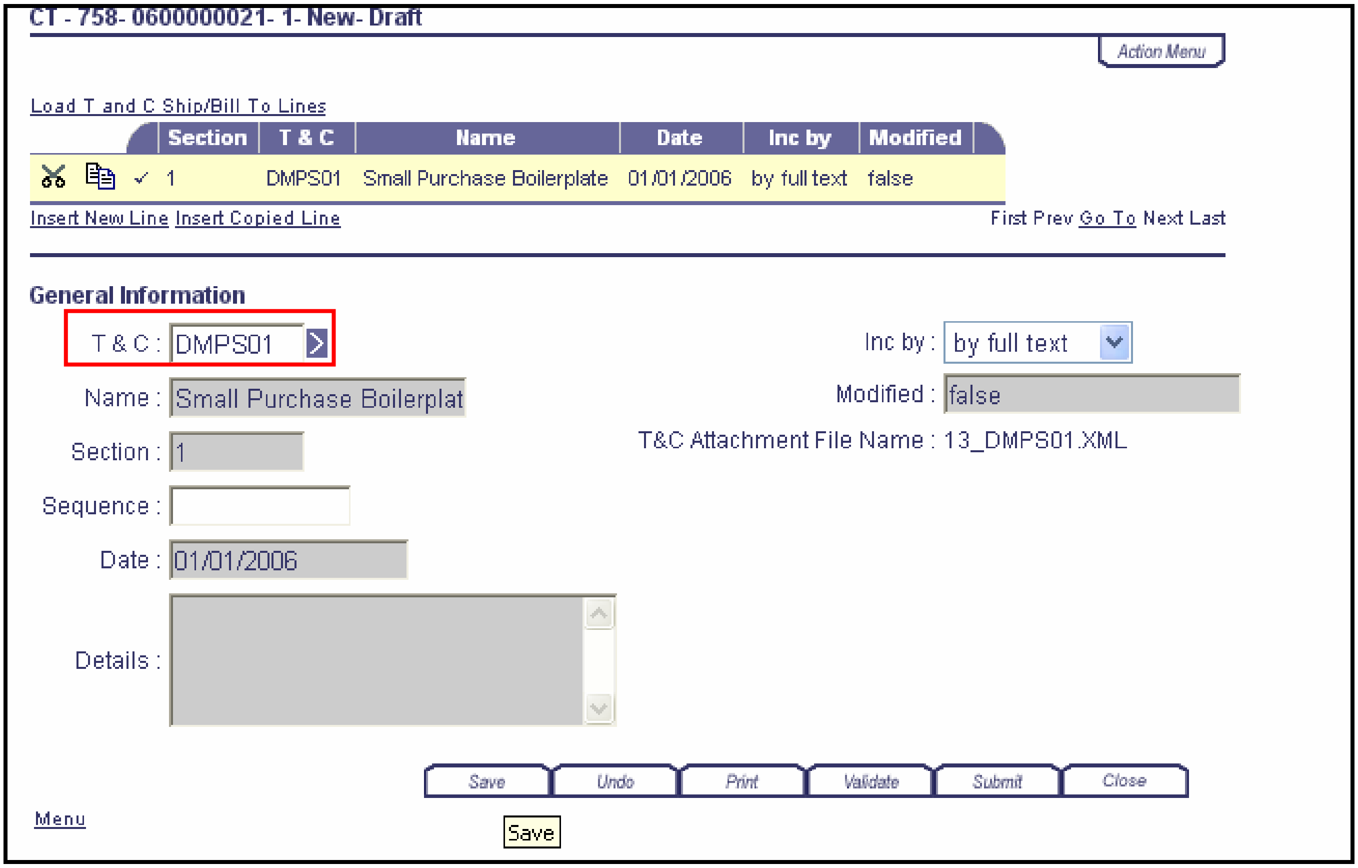


9. Click **Distribute Accounting Lines** to distribute the Fund and Detail Accounting information to each Commodity line.
10. Click **Commodity** on the Secondary Navigation Panel. To view the information that defaulted from the Solicitation.

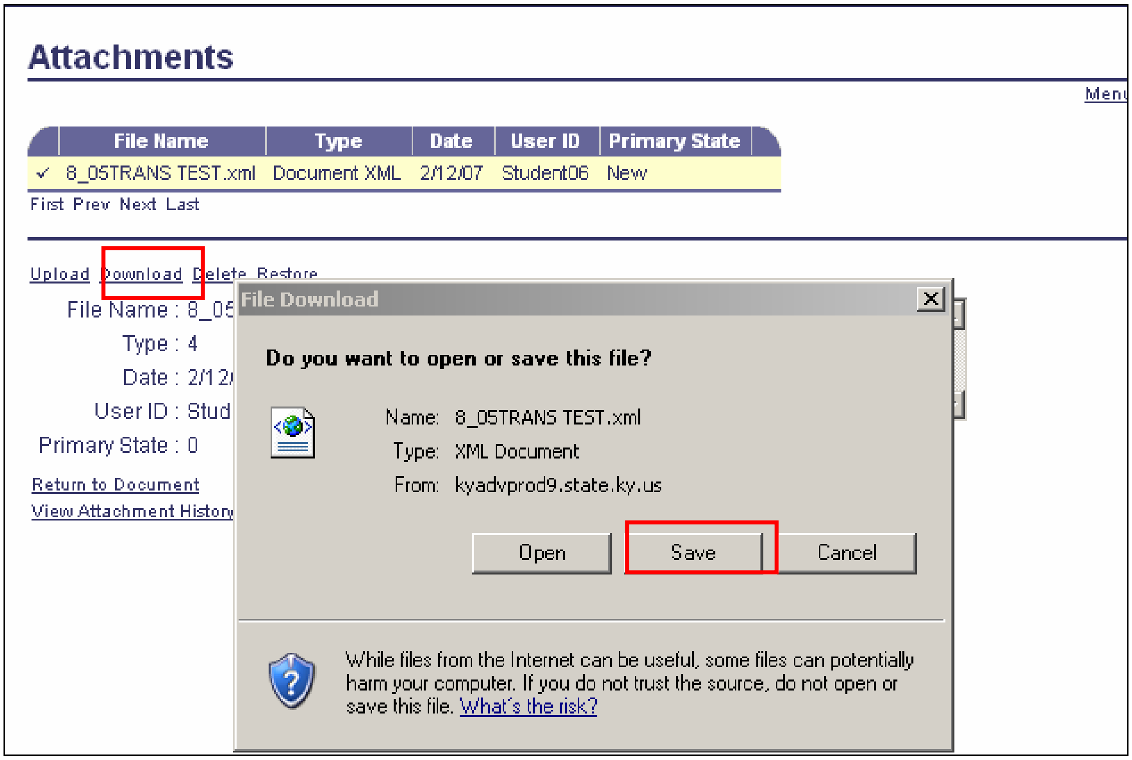


11. Click **Ship/Bill To Lines**

12. Click **Terms and Conditions** in the Secondary Navigation Panel. This section will be populated with the Terms and Conditions used in the Solicitation document. The Terms and Conditions should be modified and updated.



13. Click on the **Attachments** link from the **Action Menu**. This will allow you to **Download** a copy of the MS-Word document for you to modify.
14. The Attachment page opens. Click the **Download** link.
15. Click **Save** to save a copy to your local file system.



16. Once you have saved a local copy, **<u>Open</u>** the file in MS-Word to make your changes. Make your changes and Save the file as **.XML**. When editing the file please observe the following rules:

Do's:

- Do ensure you are utilizing Word 2003 before attempting to edit **T&C**.
- Do set your top margin of your Word Document to 1.5.
- Do save the document as an **.XML** file.
- Do add Supporting Documents when necessary. These documents must also be in **.XML** format, but they will appear below the **Terms and Conditions** when the document is assembled. If multiple attachments are used, there will be a page break between each attachment. If you insert a line accidentally, you need to delete it by using the scissor icon.
- Do use "Normal" formatting for all text.
- Do use "Grid" formatting for all tables.
- Do clear all formatting, and then reformat your bolding, bullets, and justifications if using an existing document for the first time.
- Do select the "Free" **T&C**, then delete the attached file and upload your **.XML** document. If you have inserted a link to a picture(s) in your document, you must upload the picture file(s) after you have uploaded the **.XML** file.
- Do attach any type of document, regardless of file type in the **Header** section.

Don'ts

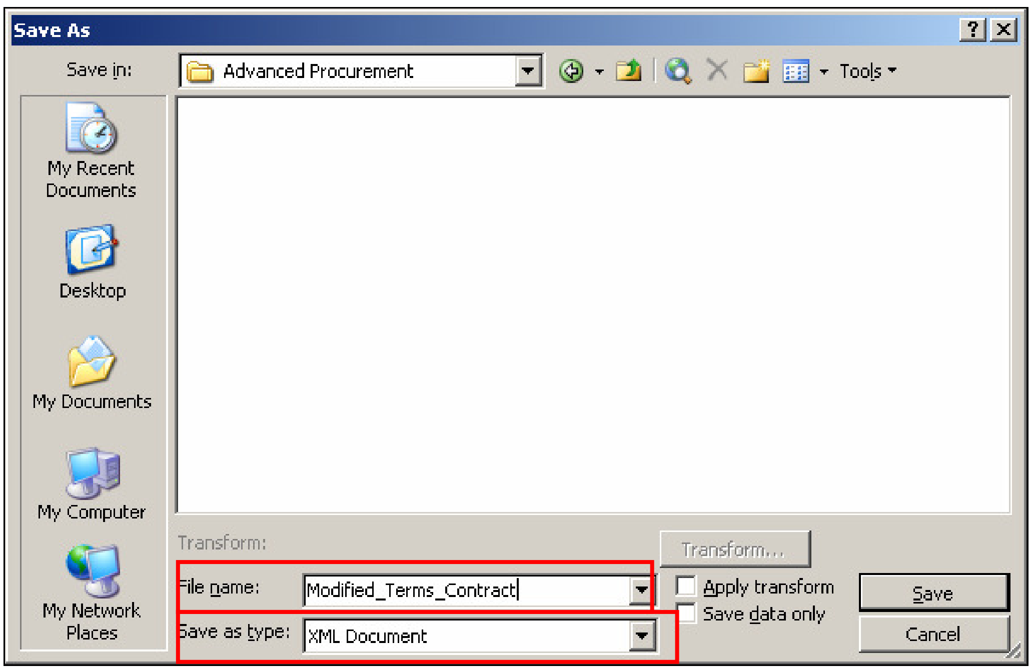
- Don't use Section breaks – the assembly process stops at the first section break.
- Don't use Page breaks – these are ignored in the assembly process.
- Don't use Track Changes.
- Don't add **Terms and Conditions** to the Commodity **T&Cs** section – add to the **Terms and Conditions** section only.
- Don't insert blank lines.
- Don't insert objects directly into the document.
    - If you have a picture, you must insert as a link to the file.

17. Add the following to your MS-Word document:

Updated version of Terms and Conditions for the Contract document. Changes will need to be made to reflect the most current Terms.

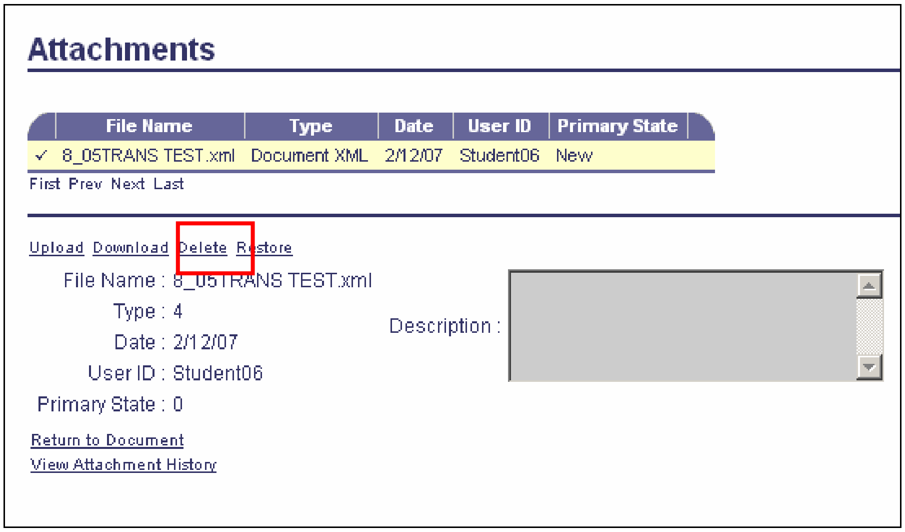
18. Once you have made your changes, Save the file as Modified_Terms_Contract.XML

Use the MA-Word "Save As" feature to save the document. Enter Modified_Terms_Contract and the File Name. Select "XML Document" (.XML) for Save As Type

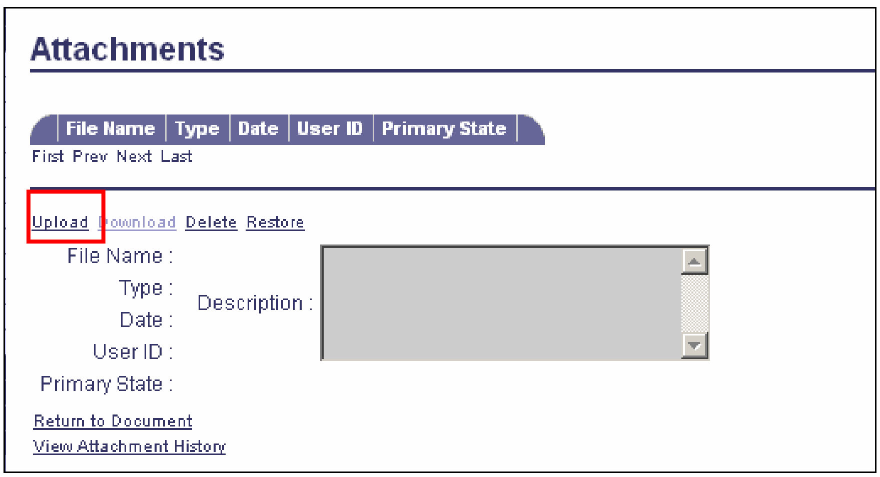


19. Close MS Word.

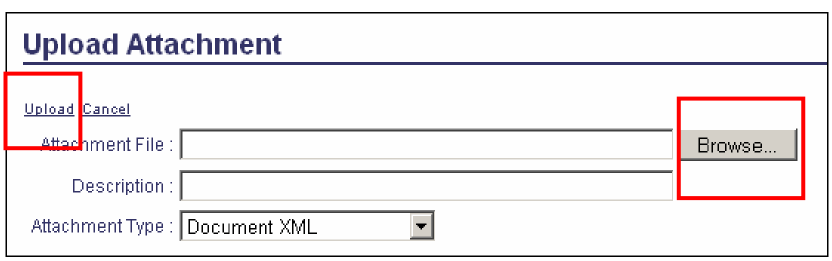
20. Return to the **Attachments** page. Delete the previous version of the attachment by clicking on the **<u>Delete</u>** link.



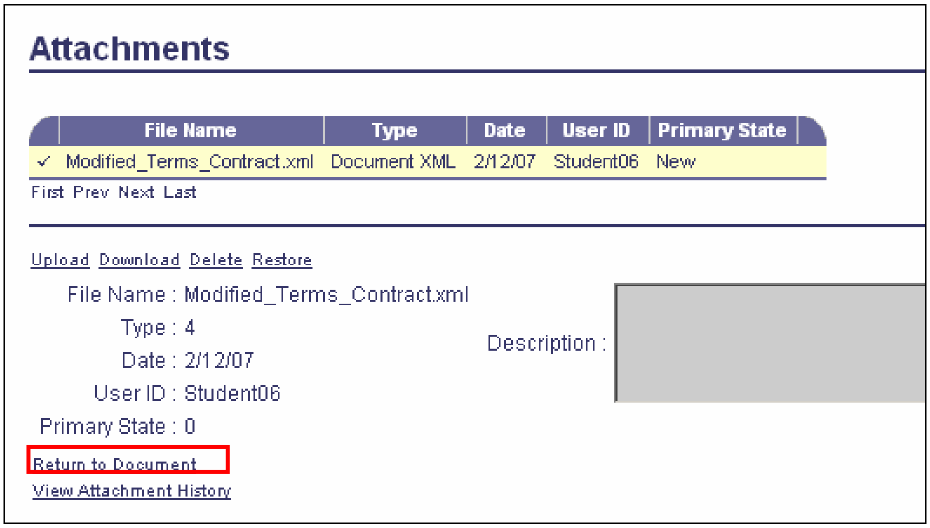
21. Upload the new version you created in Step 19 by clicking on the **Upload** link.



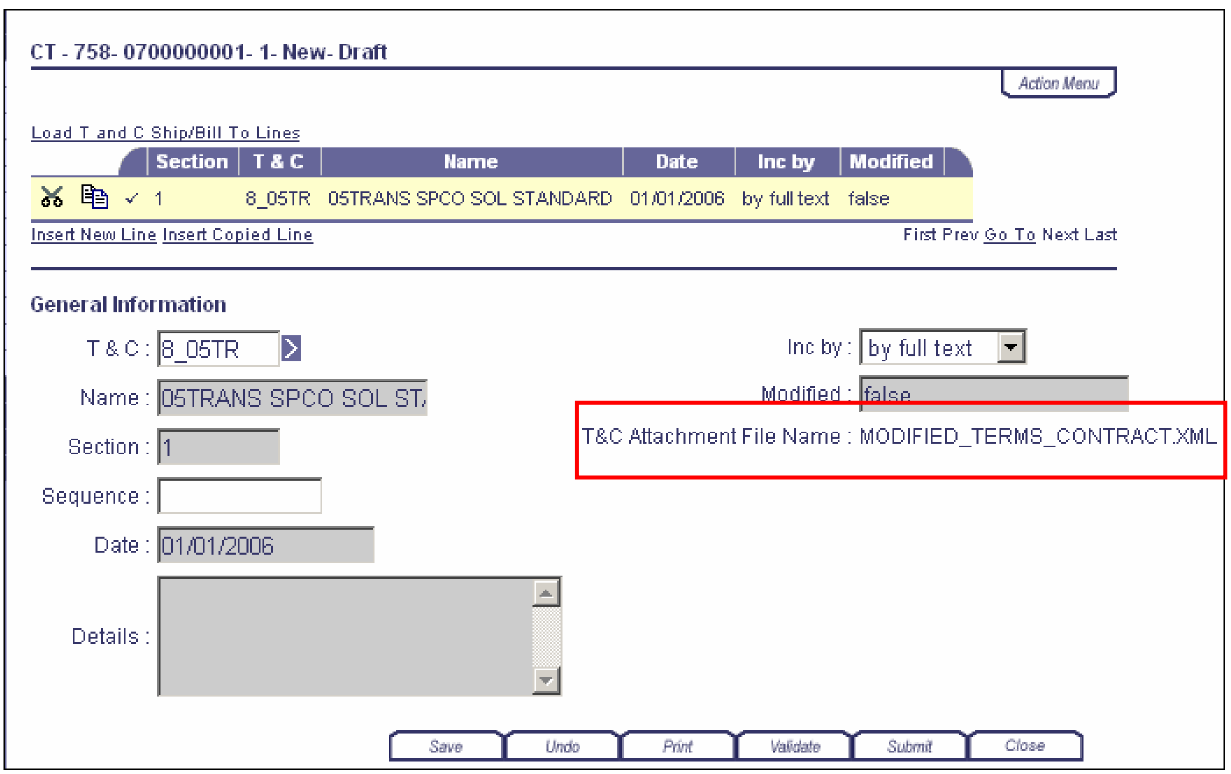
22. Click Browse to locate **Modified_Terms_Contract.XML** on your desktop.



23. Click the **Upload** link. After the file is uploaded, you are returned to the **Attachments** page.



24. Click the Return to Document link to return to the Terms and Conditions section of the Contract (CT) document. Notice that the Terms and Conditions Attachment File Name has changed to you new file. This new file will be used in the bid package/print-out.



25. Click **Validate** to check the Contract for errors.

<u>To Assemble</u>:

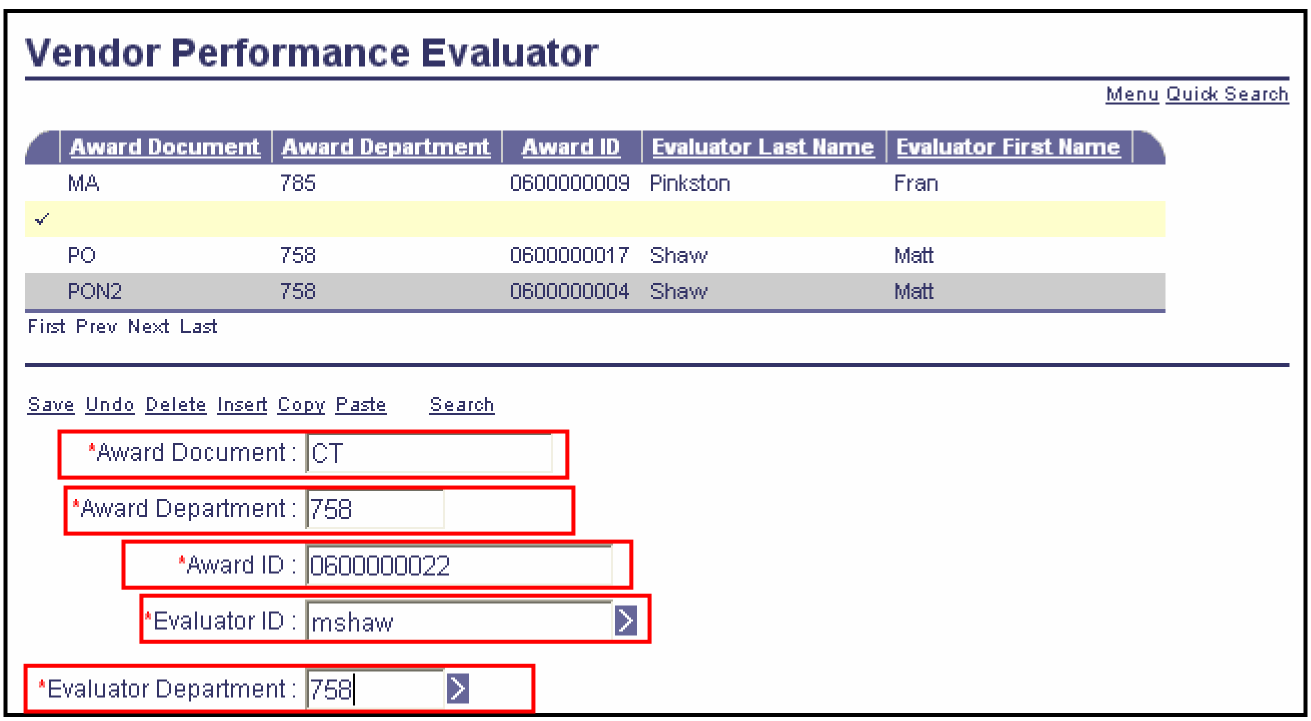
5 From the Header Section click on **<u>Assemble Document</u>**
6 Click **<u>Submit Assemble Request</u>**
7 Click on **<u>Refresh</u>**, You should see the status as Successful (You may have to click refresh a few times before the assembly job finishes and you see a Successful Status).
8 Click **<u>Back</u>** to return to the document

<u>To Print the Assembled Form</u>:

1 Return to **Header**
2 From the **<u>Action Menu</u>**, select **<u>Attachments</u>**.
3 **Download** the document to Print.

Return to the eMARS application by closing out the **PDF** file. Once in the Attachments page click **<u>Return To Document</u>** to return to the Contract **Header**.

26. Click **<u>Submit</u>** to finalize the document.
27. Record your **Document ID** for this Contract as you will need it for the next few steps.
28. Click **<u>Close</u>**
29. Click the **<u>Home</u>** action button, then click **<u>Page Search</u>** from the Secondary Navigation Panel. Enter **PEEVALR** into the Page Code field and click **<u>Browse.</u>** Click the **<u>Vendor Performance Evaluator</u>** link. The **Vendor Performance Evaluator** table will open.
30. Click **<u>Insert</u>**


Vendor Performance Evaluator

Menu Quick Search

	Award Document	Award Department	Award ID	Evaluator Last Name	Evaluator First Name
	MA	785	0600000009	Pinkston	Fran
✓					
	PO	758	0600000017	Shaw	Matt
	PON2	758	0600000004	Shaw	Matt

First Prev Next Last

Save Undo Delete Insert Copy Paste Search

*Award Document : CT
*Award Department : 758
*Award ID : 0600000022
*Evaluator ID : mshaw
*Evaluator Department : 758

32. Enter the following information in to the required fields:

Required Fields	Values
Award Document	Enter: "**CT**"
Award Department	Enter: **Document department from your Student Card**
Award ID	Enter: **ID value for the Contract you just created**.
Evaluator ID	Enter: **Student ID from your Student Card**
Evaluator Department	Enter: **Document department from your Student Card**

33. Click **Save**

8 – Create a Master Agreement for a Catalog.

Master Agreement (**MA**) documents will be used to establish an award for recurring requirements between external vendors and the Commonwealth. The **MA** will also be used to establish the Master Agreements held by Correctional Industries.

NOTE: In eMARS there is no distinct document for Catalog Master Agreements. The regular Master Agreement (**MA**) is used with a **Line Type** of Catalog.

The Master Agreement (**MA**) document in eMARS has no accounting consequence other than to liquidate any Pre-Encumbrance established on a referenced Requisition (RQS). Furthermore, there is no Accounting Section.

The Master Agreement document may have multiple Vendors. When a user processes a Delivery Order or Payment Request referencing the Master Agreement (**MA**) then they will select which Vendor will provide the selected items.

The following table shows the differences between a Contract (**CT**) Document and a Master Agreement and will help identify when to use each one.

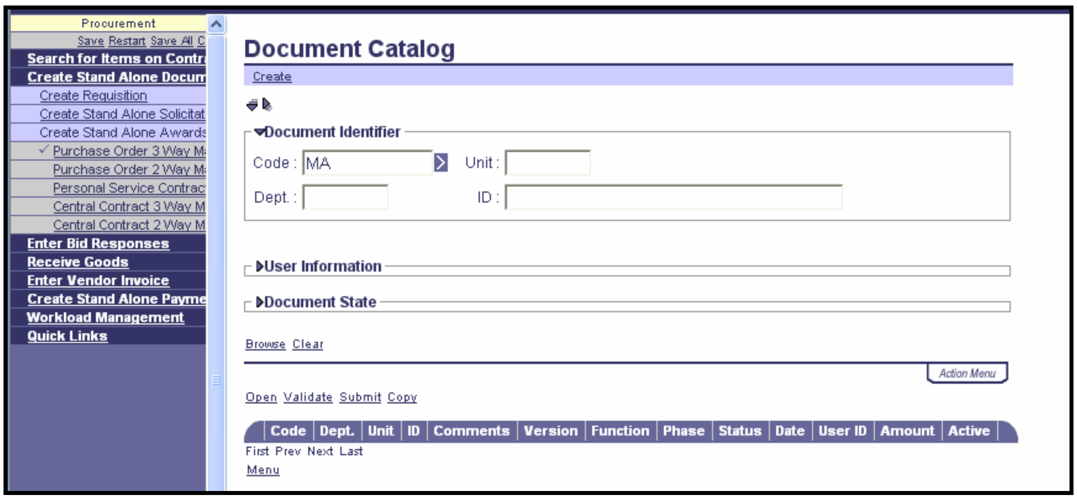
Requirement	Master Agreement	Contract
One Time Purchase	No	Yes
Recurring Requirement	Yes	No
Commit Funding	No	Yes
Award may require renewal.	Yes	No
Award may be used by All State Agencies and Political Sub-Entities	Yes	No
Award use may be restricted to a single agency	Yes	Yes
There is a Vendor Catalog	Yes	No
Prices may fluctuate	Yes	No
Multiple-Vendors are supported	Yes	No

MAs may be created in one of three ways:

1. **Copy Forward** from a Requisition (**RQS**) document.
2. As the result of a Competitive Bidding process from the Evaluation (**EV**) document.
3. Stand-Alone from your Document Catalog.

Master Agreement

Access the **Document Catalog** by clicking on **Search** in the Secondary Navigation Panel. Then select **Document Catalog.** The Document Catalog opens.



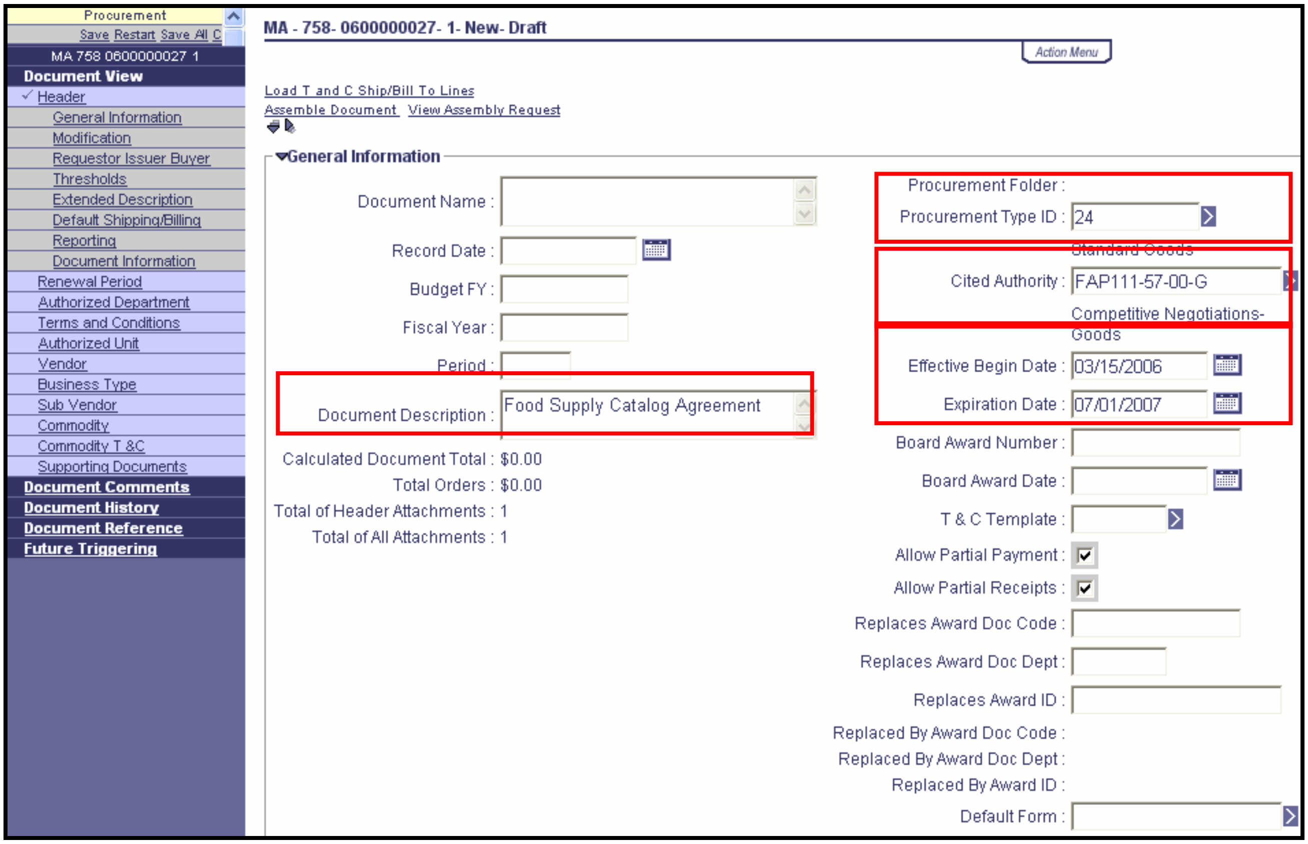
Click **Create** to switch into create mode.

Enter your **Department** and **Unit Codes** into their respective fields.

Click **Auto Numbering** to have eMARS generate a unique document number for the Master Agreement (**MA**).

Click **Create** and the Master Agreement (**MA**) will open to the Header section.

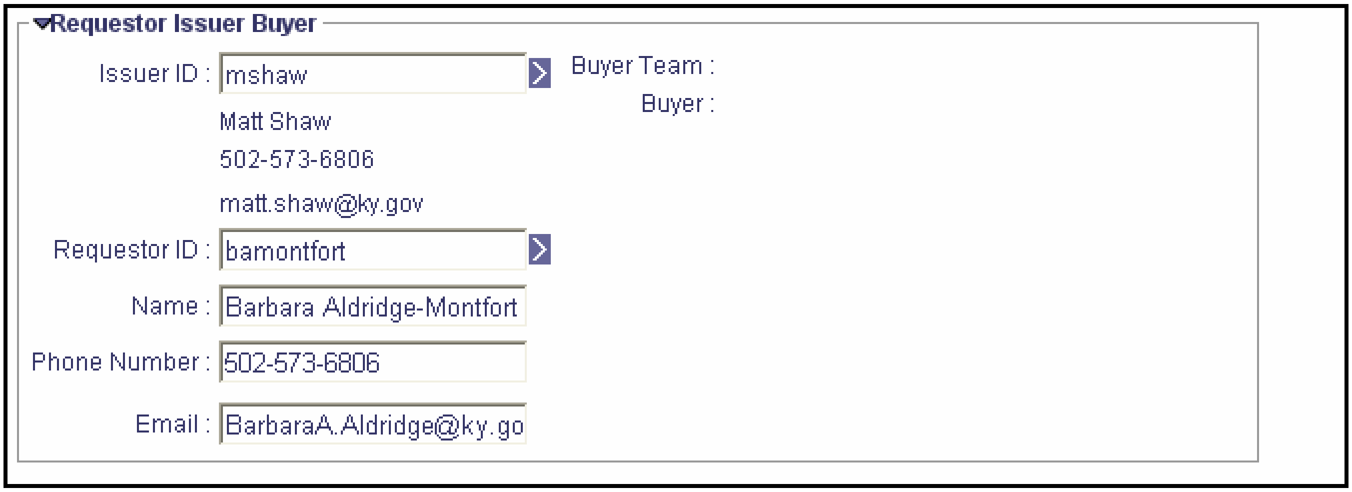
Complete all the required fields in the Master Agreement Header.



- The **Document Description** is required and does print-out. The description is also searchable from various inquiries like the Procurement Document Inquiry (**PRCUDOC**).
- Select a **Procurement Type ID** that corresponds to the business process being followed.
- The **Cited Authority** represents the authority which enables a user to enter the specific document for the amount specified on the document. This list is pre-filtered by your selection in the **Procurement Type** field.

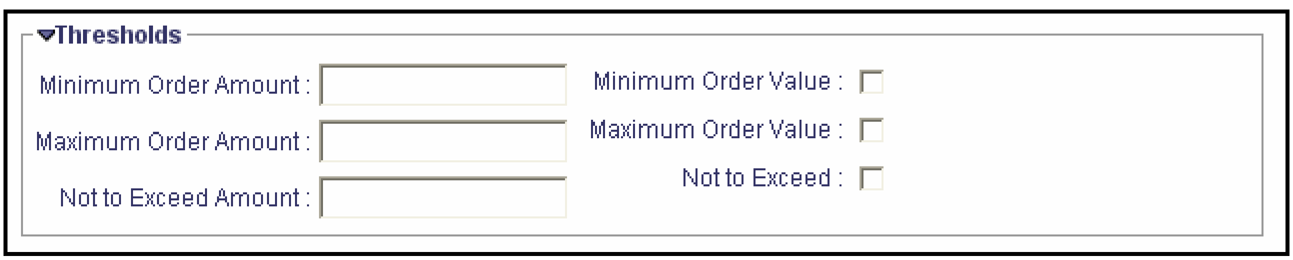
- Do not enter a **Budget FY**, **Fiscal Year**, or **Period.** They will be automatically populated for you when the document is Submitted to Final.
- Select an **Effective Begin Date** that corresponds to the date from which users should be able to order from this **MA** or **Catalog**.
- Select an **Expiration Date** that corresponds to the date after which users should no longer be able to order from this **MA** or **Catalog**.

Complete the **Requestor Issuer Buyer** section.



- The **Issuer ID** field will default to your information. If your are completing the document on someone else's behalf then pick their record from the pick-list by clicking on the **arrow** next to the **Issuer ID** field.
- The **Requestor ID** field will be blank and you will need to complete this field. The **Requesting ID** field is used to identify for whom the goods or services are being requested. Pick their record from the Requestor pick-list by clicking on the **arrow** next to the **Requestor ID** field.

Complete the **Thresholds** Section



- Select the **Minimum Order Value** check-box if you would like eMARS to enforce a minimum order value for Delivery Orders and Payment Requests that reference this Master Agreement (**MA**). If the **Minimum Order Value** check-box is selected then you must provide a value in the **Minimum Order Amount** field.

- The **Minimum Order Amount** field is used to establish the minimum dollar amount for orders and Payment Requests referencing the Master Agreement (**MA**).

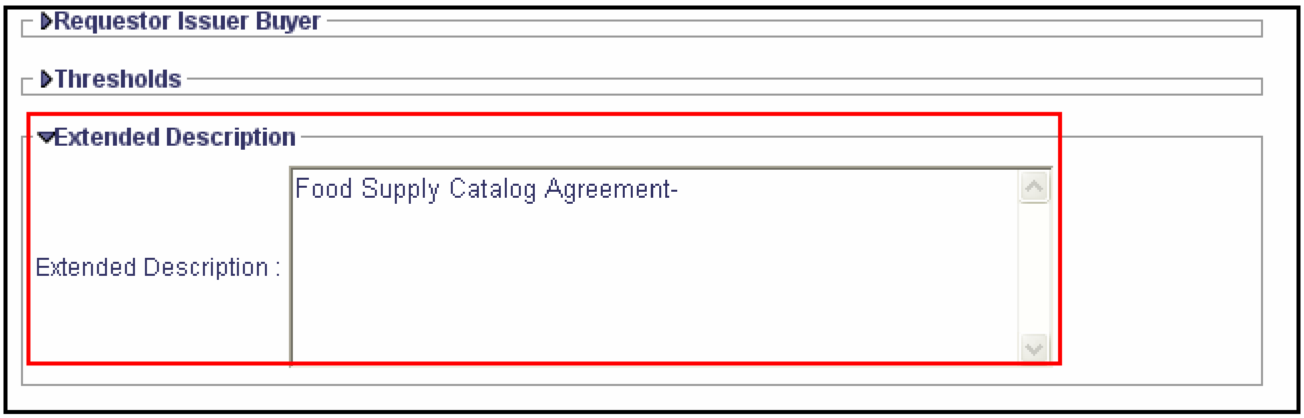
- Select the **Maximum Order Value** check-box if you would like eMARS to enforce a maximum order value for Delivery Orders and Payment Requests that reference this Master Agreement (**MA**). If the **Maximum Order Value** check-box is selected then you must provide a value in the **Maximum Order Amount** field.

- The **Maximum Order Amount** field is used to establish the maximum dollar amount for orders and Payment Requests referencing the Master Agreement (**MA**).

- Select the **Not to Exceed** check-box if you would like to establish an upper ceiling for all Orders and Payment Requests that reference this Master Agreement. If the **Not To Exceed** check-box is selected, then a value must be provided in the **Not to Exceed Amount** field.

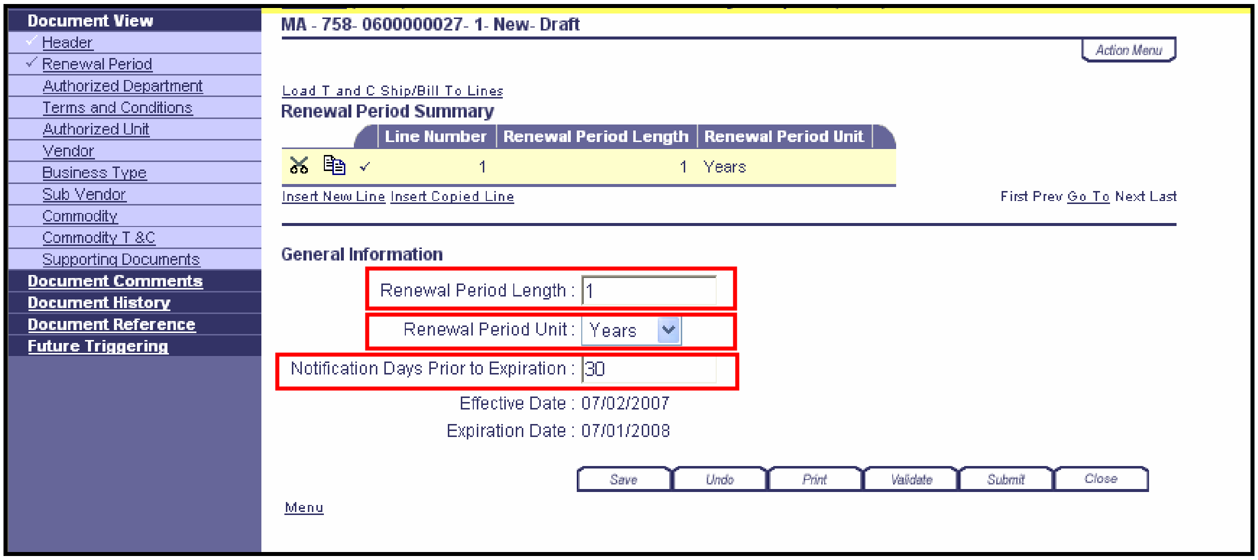
- The **Not to Exceed Amount** is the maximum dollar amount of all orders referencing the Master Agreement (**MA**).

Complete the **Extended Description** Field (optional).



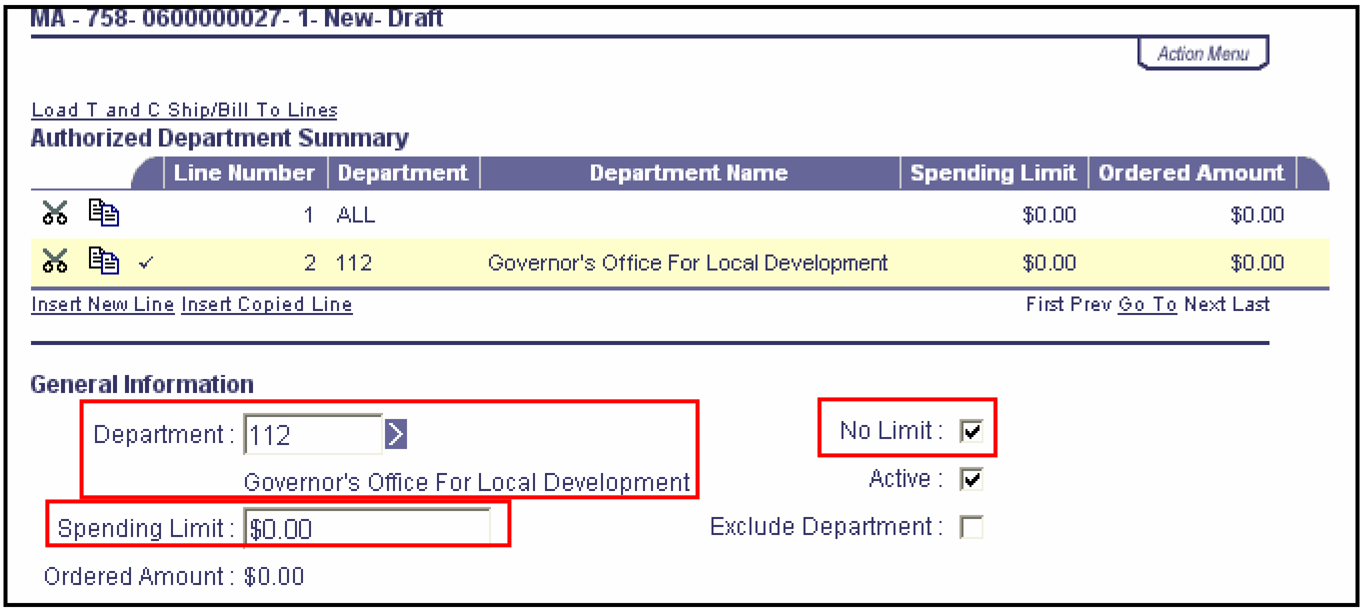
- The **Extended Description** field can be used to further describe the nature of the items or service available on Contract. This field can store up to 1500 characters of text. This field does not print.

Complete the **Renewal Period** Section. A Master Agreement (MA) must have at least one record for **Renewal Periods.** A record on this component represents a single **Renewal Period.**



- Set the **Renewal Period Length** to the number of **Renewal Period Units** required. For example if you would like a two month **Renewal Period** set the **Renewal Period Length** to 2.
- Set the **Renewal period Unit** to one of the following values based on the terms of the agreement. Valid options are “Days”, “Weeks”, “Months”, and “Years”.
- The **Notification Days Prior to Expiration** field should be set to the desired number of days before the Master Agreement (**MA**) will expire that the Buyer will receive e-mail notification of the pending expiration. This value should be set to a number of days far enough in advance that the **MA** can be renewed in time.
- The **Effective Date** field shows what the **Effective Date** of the Master Agreement (**MA**) would be set to if this **Renewal Period** is put into effect.
- The **Expiration Date** field shows what the **Expiration Date** of the Master Agreement (**MA**) would be set to if this **Renewal Period** is put into effect.

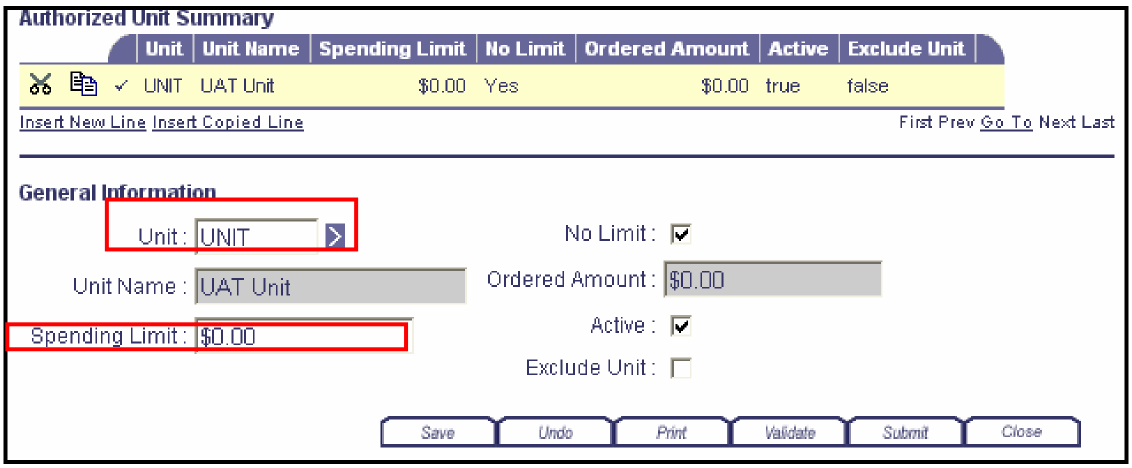
Complete the **Authorized Department** Section (optional). The records on this component determine which departments are eligible to order from the Master Agreement (**MA**). For an **All-State Agency** Master Agreement (**MA**), create a single record with a Department of "All". Otherwise, develop a list of the Departments that are eligible to order from the **MA**. You may also limit the amount a Department may spend against the Master Agreement (**MA**).



- If you plan to limit who may use this **MA** then you must specify each **Department** which is eligible to make purchases from this Master Agreement (**MA**) (Required).
- Specify a Dollar Value **Spending Limit** for each Department or if the **MA** is unlimited, leave blank and be sure to check the **No Limit** check-box.
- If the **No Limit** checkbox is selected then there is **No Limit** on spending for this Department

Complete the **Authorized Unit** Section (optional). This section allows you to further control who may order from a Master Agreement (**MA**). For each Department listed on the **Authorized Department** Section you further list the organizational Units who may order from the Master Agreement (**MA**). To specify which Units are authorized you must first select the Department on the **Authorized Department** section and then transition to the **Authorized Unit** Section and create a list of those Units who may order. The **Authorized Unit** Section is optional.

NOTE: You may not specify **Authorized Units** if All State Departments are authorized. That is, if you have selected a Department of "ALL" on the **Authorized Department** Section, you may not enter any **Authorized Units**.

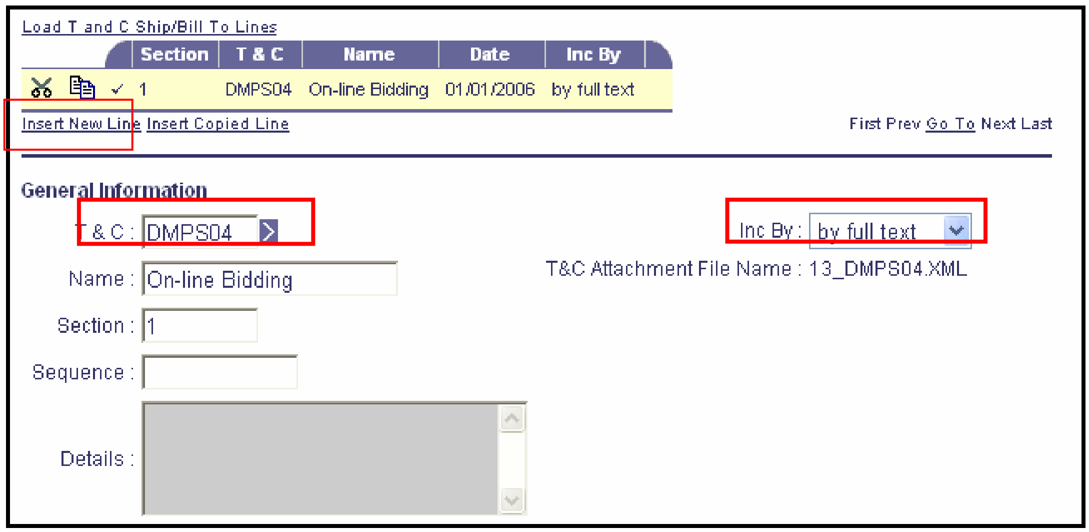


- If you plan to limit who may use this **MA** then you must specify each **Unit** which is eligible to make purchases from this Master Agreement (**MA**). (Required).
- Specify a Dollar Value **Spending Limit** for each Unit or if the **MA** is unlimited, leave blank and be sure to check the **No Limit** check-box.
- If the **No Limit** checkbox is selected then there is no limit on spending for this Unit.

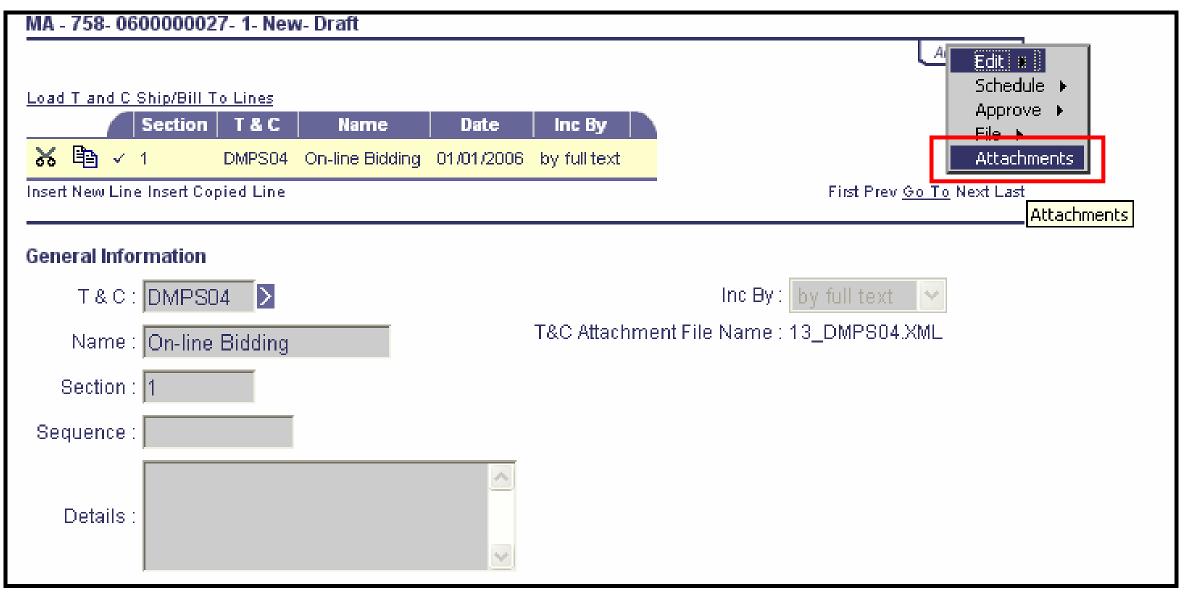
Create your **Terms and Conditions**. Terms and Conditions are created by attaching a Word Document, saved as **.XML**, to a Terms and Conditions record on the Terms and Conditions Section. Kentucky's standard Terms and Conditions have been loaded into eMARS and you may also select one to many of these to be included in the printed document. You may also modify the Standard Terms and Conditions as you see fit.

Please follow these steps to select a standard Terms and Conditions and modify:

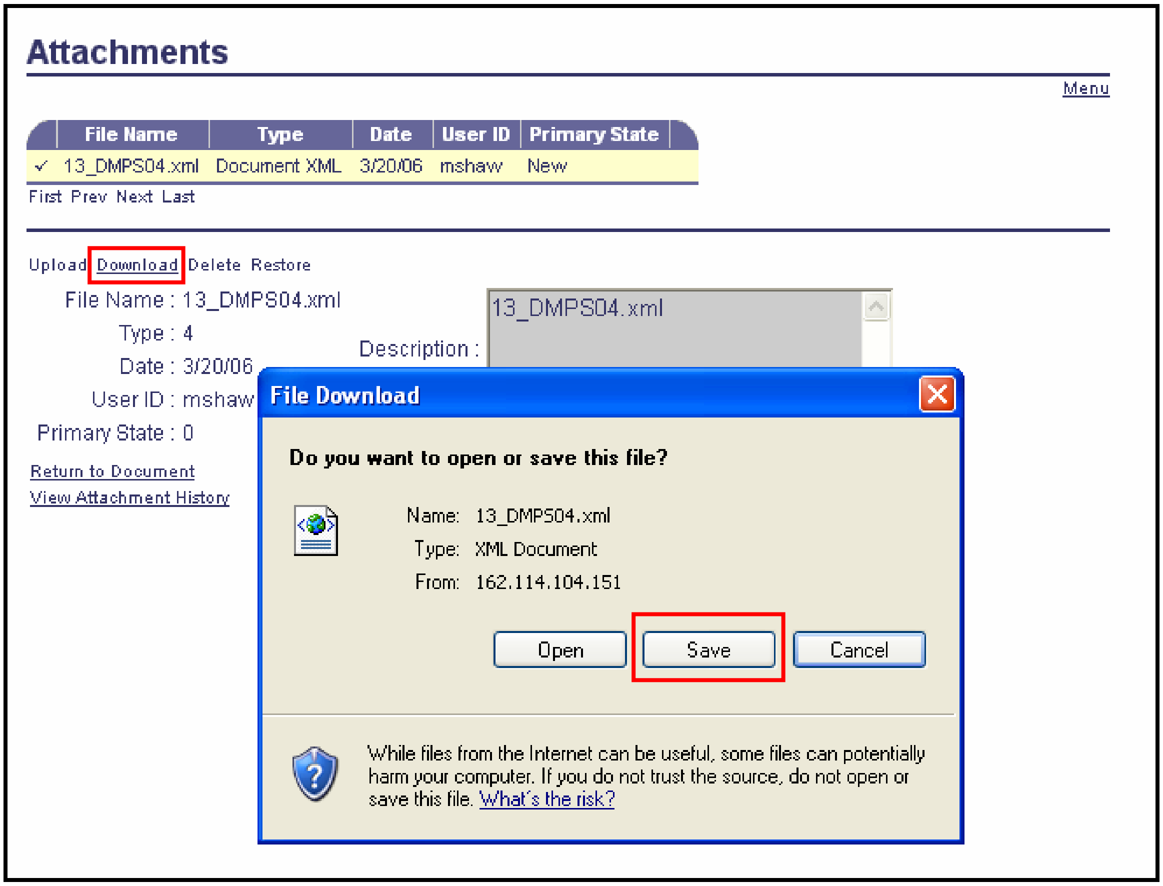
Go to the **Terms and Conditions** Section and click **<u>Insert New Line</u>**. When the record has been added, click on the **<u>Pick List</u>** to select a Standard **T&C** from the list.



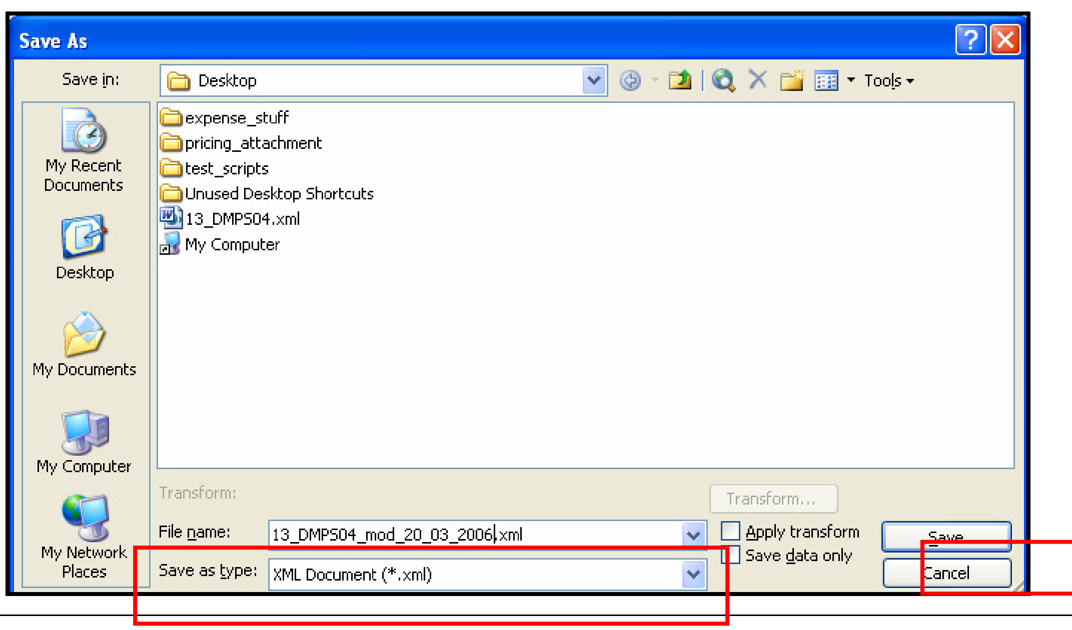
Open the **<u>Action Menu</u>** and click **<u>Attachments</u>**. This will allow you to download a copy of the MS-Word document to modify.



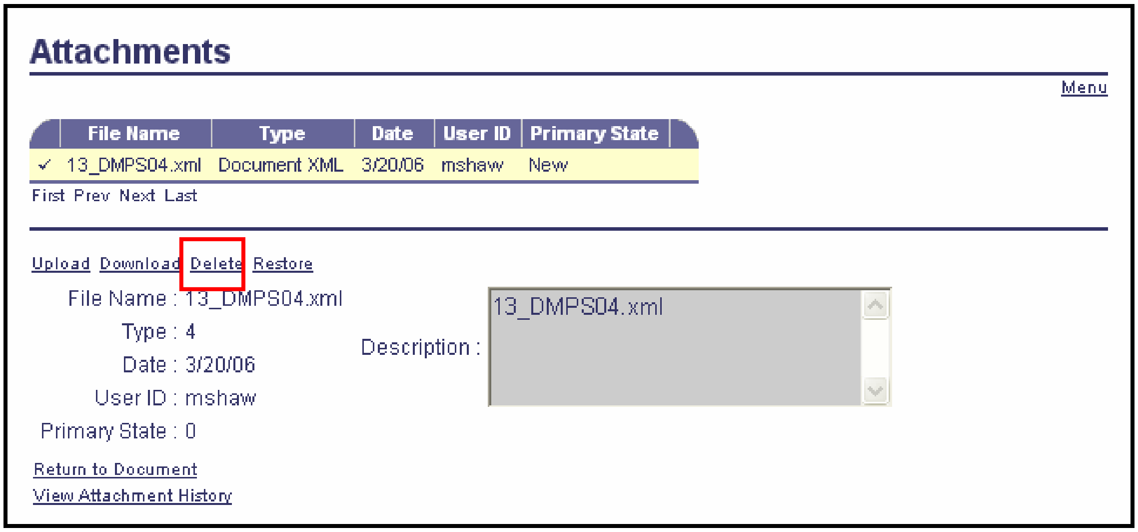
Click **Download** and then **Save** to save a copy to your local file system.



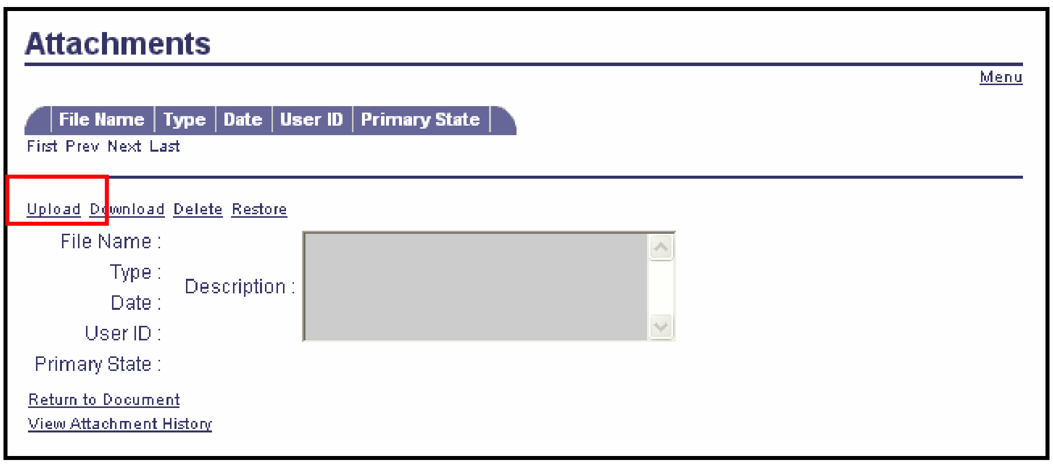
Open the file in MS-Word to make your changes. Once you have made your changes you must save the file as **.XML**.



Return to the Terms and Conditions record and access the **Attachment** page again through the **Action Menu**. Delete the previous version of the attachment by clicking **Delete**.

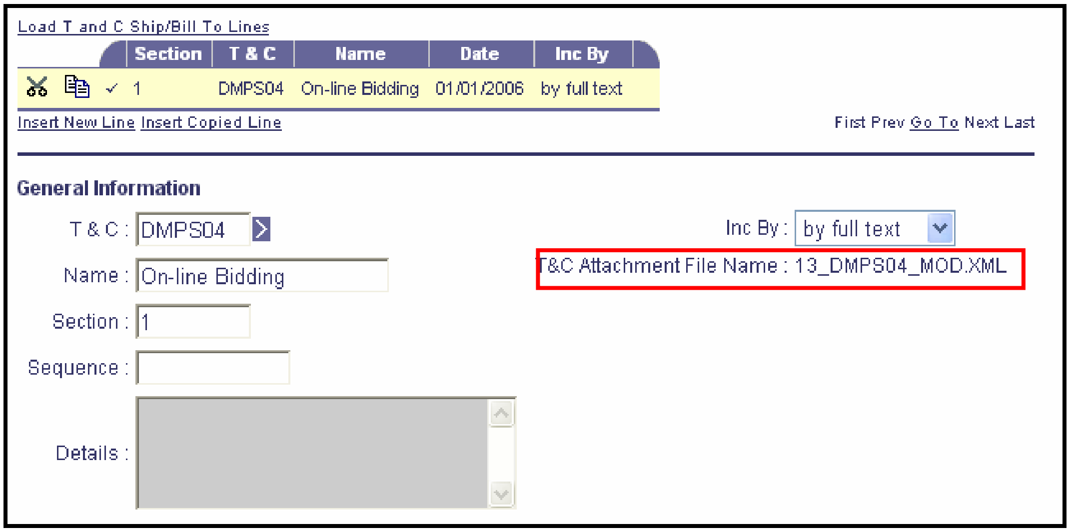


Now upload the new version you just created by clicking on the **Upload** link.

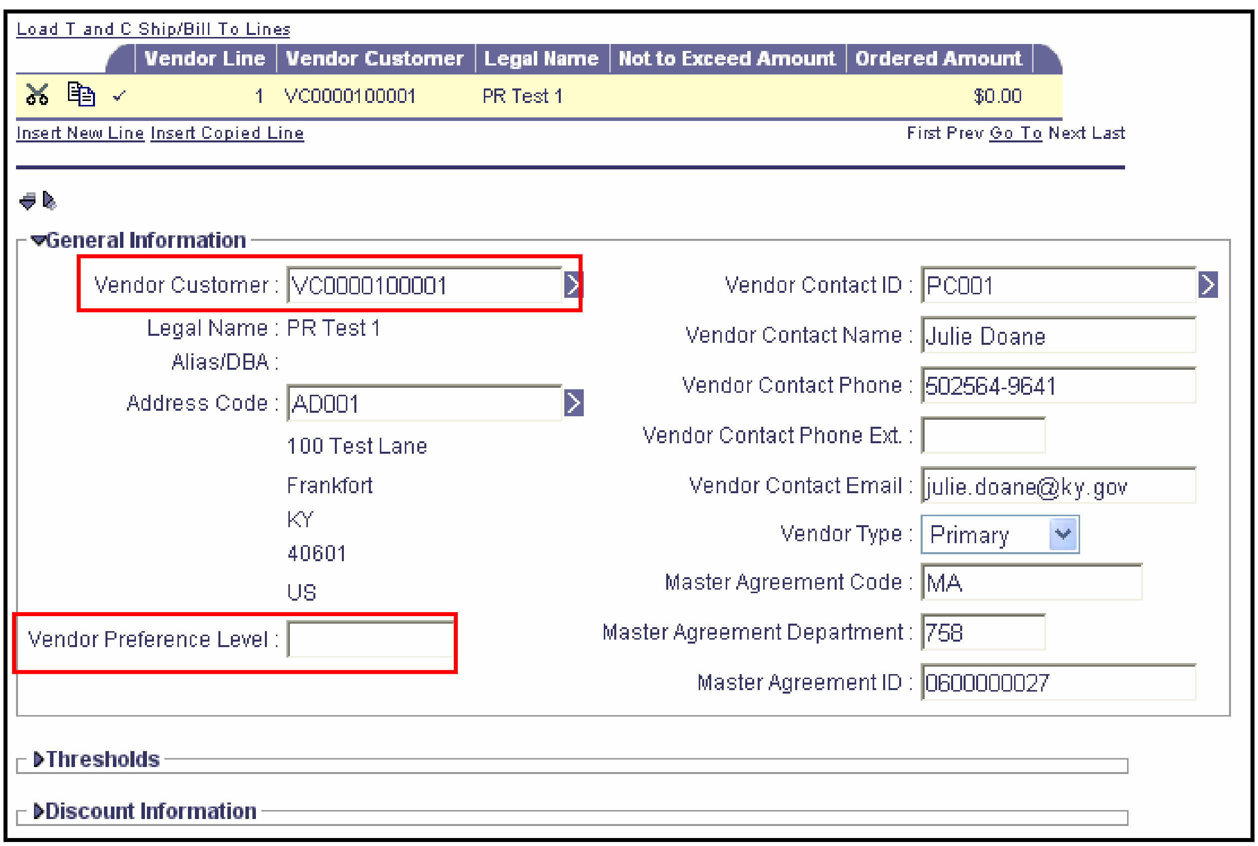


Browse for the file on your Desktop and then **Upload** the file into your document.

After you click the **Upload** link you will notice that the Terms and Conditions Attachment file name has changed to your new file. eMARS will use this new file in the print-out..



Select a **Vendor** for the Master Agreement (**MA**) on the Vendor Section.



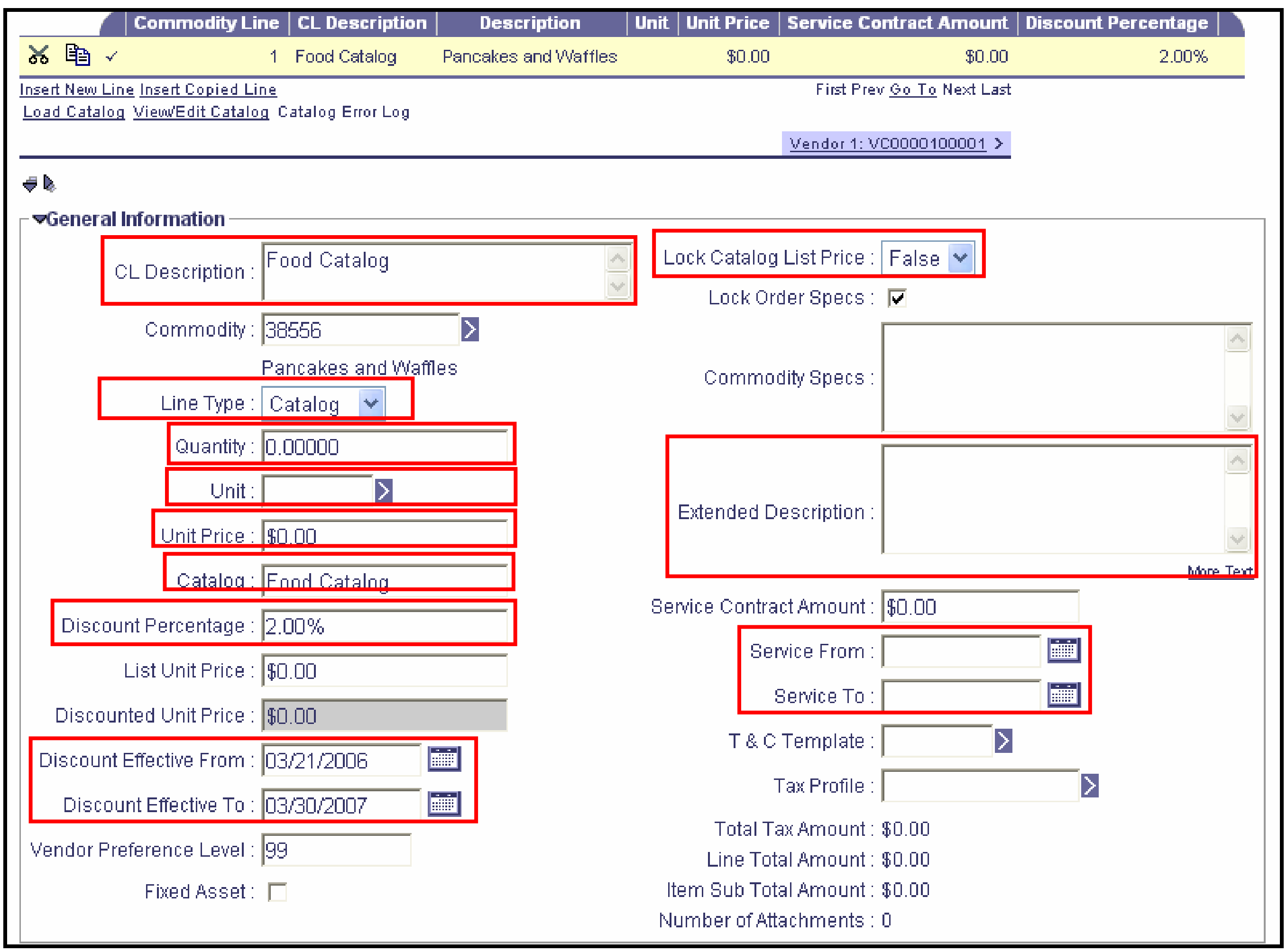
- The **Vendor Customer** code field is used to store the eMARS Vendor Code for the Vendor being recorded. Click on the **arrow** next to the **Vendor Customer** field to open the **Vendor**

Customer pick list. On the pick-list page you may search for a Vendor by **Legal Name**, **Last Name**, **Alias**, and/or **Vendor Active Status**. If you know part of the Vendor Code field you may type it into the **Vendor Customer** field using wildcards. When you click on the **arrow**, the Vendor pick-list will be filtered by the value you have entered.

- The **Vendor Preference Level** field will default to the value from the Vendor table. You may not change it. The **Vendor Preference Level** is used to sort the result set generated in the Catalog search. A lower **Preference Level** will move the items from this Vendor higher in the result-set compared to another item from a different vendor with the exact same relevancy score. This field is used to give preference in the search results for those Vendors required to receive preference, such as Correctional Industries.

NOTE: The Vendor Address and Contact information will default to this document when it is validated

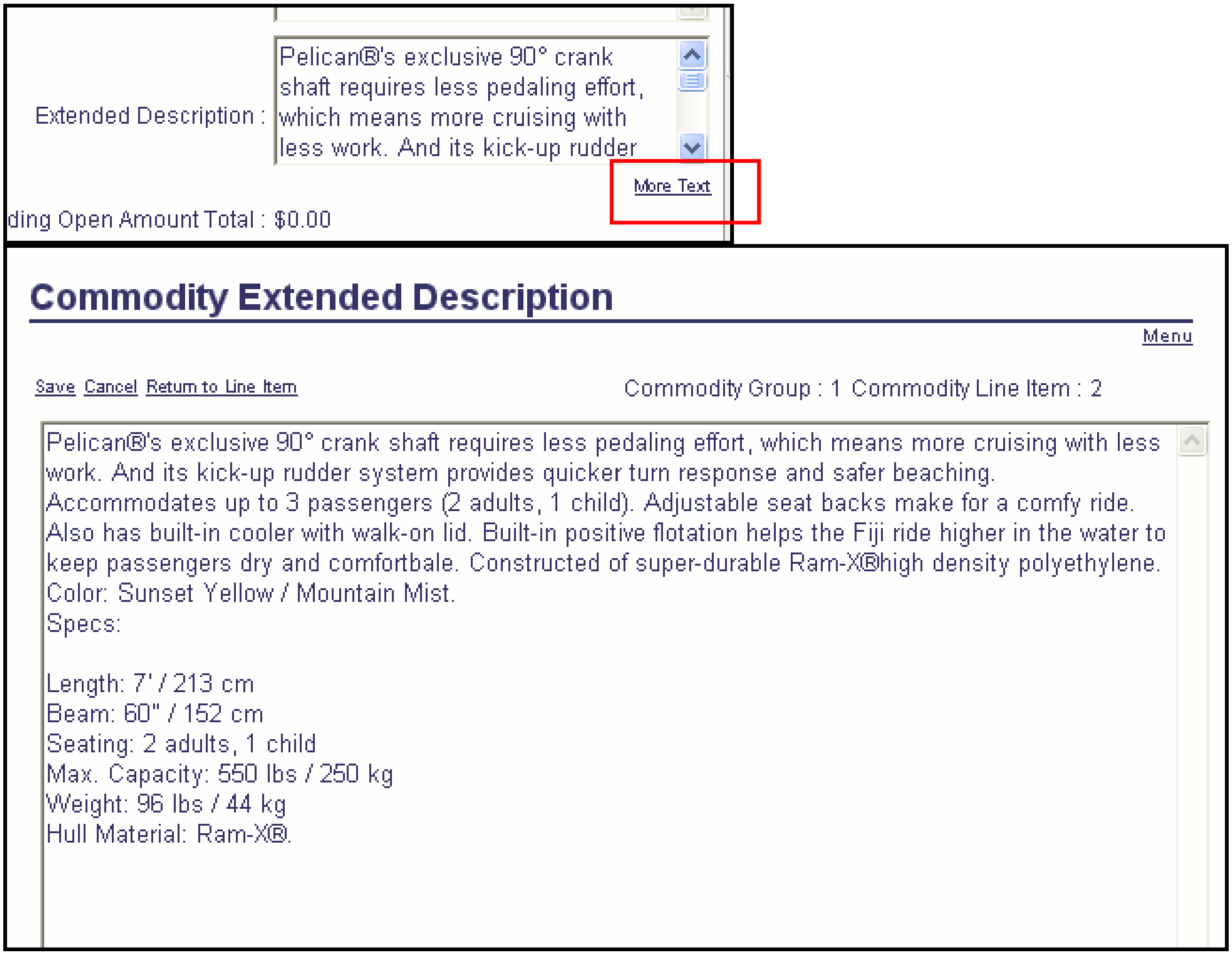
Create the Commodity lines for the Master Agreement (**MA**). **Insert a New Line** item for each Commodity available on this Master Agreement (**MA**) or create a single Commodity line and attach a Catalog file. First, complete the required fields for the Commodity **General Information** section.



- The **CL Description** field should be used to record a brief description of the good or service being requested. This field does print-out on all documents and is used on subsequent Procurement Documents. This field is displayed in the grid area of the Commodity section in order to help you identify which line you would like to inspect or modify.
- The **Commodity** field is used to store the **NIGP** Commodity Code that most closely matches the item or service being purchased. This field is used primarily for classification purposes.
- The **Line Type** field on the Master Agreement (**MA**) is used to select how the cost of the line item will be established. Generally speaking, goods should be recorded with a **Quantity**, **Unit of Measure** and **Unit Price** and services should be entered as **Contract Amount**. Master Agreements have two additional line types: "**Discount**" and "**Catalog**". The Discount line is designed to give the user processing the order or payment the freedom to describe the item being purchased in terms of price and specifications. For Discount lines you specify a negotiated discount off of a Vendor's list price for an off-line Catalog. This discount will be applied on the Delivery Order (**DO**) or Payment Request Commodity (**PRC**). A Discount Percentage may also be specified for Commodity lines with a Line Type of "**Catalog**". With a Catalog line however you must load a file with all of the Catalog Items.
    - When you know the **Unit Price** a **Line Type** of "**Item**" should be selected. The **Unit of Measure**, **Unit Price**, and **Quantity** are required. When a **Quantity** is entered it acts as a "Not to Exceed" amount.
    - If the unit cost is unknown or not applicable the lump sum cost of the line should be recorded in the **Contract Amount** field. In this case a **Line Type** of "**Service**" should be selected. When the **Line Type** is "**Service**" then the **Service From** and **Service To** dates are required. These dates are the effective dates for resultant award document.
    - Discount Lines require you to enter a **Catalog** name, **Discount Effective From**, **Discount Effective To** and, optionally, a **Discount Percentage**. Users may reference this line and provide the Vendor's list price and detailed specifications.
    - Catalog Lines require you to enter a **Catalog** name, **Discount Effective From**, **Discount Effective To** and, optionally, a **Discount Percentage**. Catalog lines require you to load an MS-EXCEL file in a defined format with all of the items from the Catalog. You must set the **Lock Order Specs** flag to true.

- The **Extended Description** field should be used to provide a detailed description of the desired item. Up to 4000 characters of information can be stored in this field. To access a larger field in which to type the extended description click on the More Text link.

    NOTE: To insert a TAB into the **Extended Description** field the user must type [Ctrl] + [Tab].



Complete the **Shipping**/ **Billing** information section (Optional). If this Master Agreement (**MA**) is intended for multiple department use, the **Shipping** and **Billing** information should be left blank. The ordering department would indicate the appropriate **Shipping** and **Billing** information on the resulting Delivery Order (**DO**).

- The **Shipping Location** field is used to identify where the goods requested on the Requisition should be delivered. Click on the **arrow** next to the **Shipping Location** field to access the **Shipping Location** pick-list. If you already know the **Shipping Location** code you may record it directly in this field without accessing the pick-list. The **Shipping Location** code, however, must be valid on the **Procurement Location** (**PLOC**) reference table.
- **The Billing Location** field is used to identify where the Vendor's Invoice should be mailed. Click on the **arrow** next to the **Billing Location** field to access the **Billing Location** pick-list. If you already know the **Billing Location** code you may record it directly in this field without accessing the pick-list. The **Billing Location** code, however, must be valid on the **Procurement Location** (**PLOC**) reference table.

Complete the **Specifications** section (Optional). This section may be used to record additional information that you feel should be stored separately from the Commodity Line extended description.

For Catalog Lines, load a Catalog .**XLS** file.

Catalogs may be created in two ways in EMARS:

1. One item at a time using the **View/Edit Catalog** link, or
2. By bulk loading items that have been set-up in an MS-EXCEL file that matches the eMARS format.

Format and prepare the Catalog File.

Prior to initiating the actual catalog loading process, the Buyer should review the Microsoft Excel Catalog file that was forwarded by the Vendor to verify the file format and content, for example, accurate pricing, correct items, detailed item descriptions, and so forth.

From a business process standpoint, the Buyer should take this opportunity to improve the quality of the data by expanding abbreviations, adding additional text or filling in additional fields if needed. The Buyer must also manually add the **Vendor**/**Customer** code to each line in the Catalog file. (This may be done quickly in Excel via the clipboard paste functionality.) Finally, if only one Catalog file has been provided by the Vendor, but, due to different discount or handling terms, the Master Agreement (**MA**) has been broken out into multiple Commodity lines with a **Line Type** of "Catalog", the Buyer is responsible for dividing the file into the correct number of files to match the Master Agreement (**MA**).

From a system standpoint, the format of the file must also be reviewed. The file must meet the following requirements:

Your Catalog file must have the following fields/columns in the following order exactly.

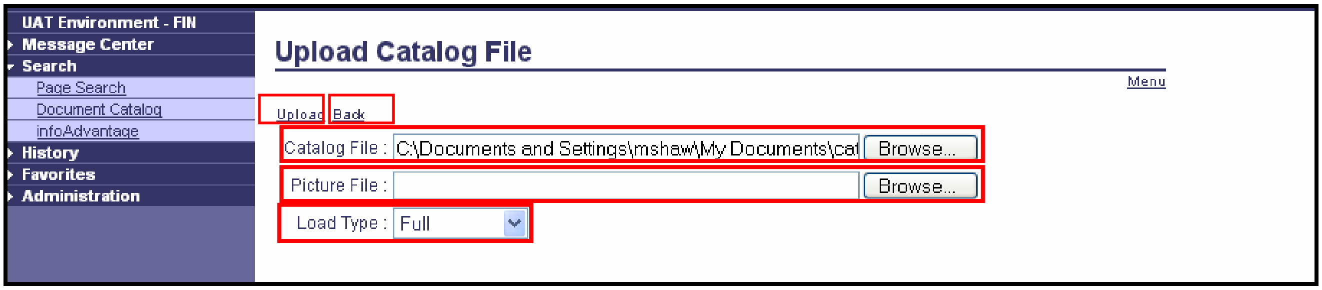
Catalog Field Name	Description	Maximum Size	Format	Optional/Required
VENDOR CUSTOMER CODE	The unique number assigned by eMARS to each vendor entered in the eMARS Vendor database.	20	Text	Required
SUPPLIER PART NUMBER	The **Supplier Part Number** is part of the record key for a catalog record, and it must be unique across all records for the same Master Agreement (MA) document.	32	Text	Required
SUPPLIER NAME	The Vendor's name.	N/A	Text	Optional
MANUFACTURER NAME	The name of the company who made the product. (optional)	25	Text	Optional
MANUFACTURER PART NUMBER	The unique number assigned by the manufacturer. (optional)	25	Text	Optional

Catalog Field Name	Description	Maximum Size	Format	Optional/Required
COMMODITY CODE	The five digit NIGP commodity code associated with this item. Must be a valid code on the Commodity table in eMARS	5	Text	Required
ITEM DESCRIPTION	The short description associated with the particular line or record. (60 characters)(Required)	60	Text	Required
EXTENDED DESCRIPTION	The extended description of the Catalog item. (4000 characters) (Required)	4000	General	Required
UNIT OF MEASURE	Must be valid on the UOM table in eMARS. (Required)	4	Text	Required
LIST PRICE	The cost of the item, up to six decimal places. (Required)	14	Number with 2 Decimal points	Required
DELIVERY DAYS	The number of days after the Order is placed when delivery can be expected.	10	Number with No Decimal Points	Required
PRODUCT/CATEGORY	Optional Specification	25	Text	Optional
MODEL	Optional Specification	25	Text	Optional
DRAWING	Optional Specification	25	Text	Optional
PIECE	Optional Specification	25	Text	Optional
SERIAL NUMBER	Optional Specification	25	Text	Optional
SPECIFICATION	Optional Specification	25	Text	Optional
SIZE	Optional Specification	25	Text	Optional
COLOR	Optional Specification	25	Text	Optional
PICTURE FILE NAME	The name of the picture file associated with this record. Must be either a .jpg or .gif extension. (optional)	225	Text	Optional

NOTE: A well formatted **.XLS** file will be available to Vendors for download from the eMARS eprocurement web-site.

NOTE: When all changes to the file are complete, you must change all EXCEL column formats to TEXT. Numeric fields will not load correctly. These are specifically the Supplier Part Number and the Commodity Code columns

Click **Load Catalog** to start the loading process. The **Upload Catalog File** page opens up.



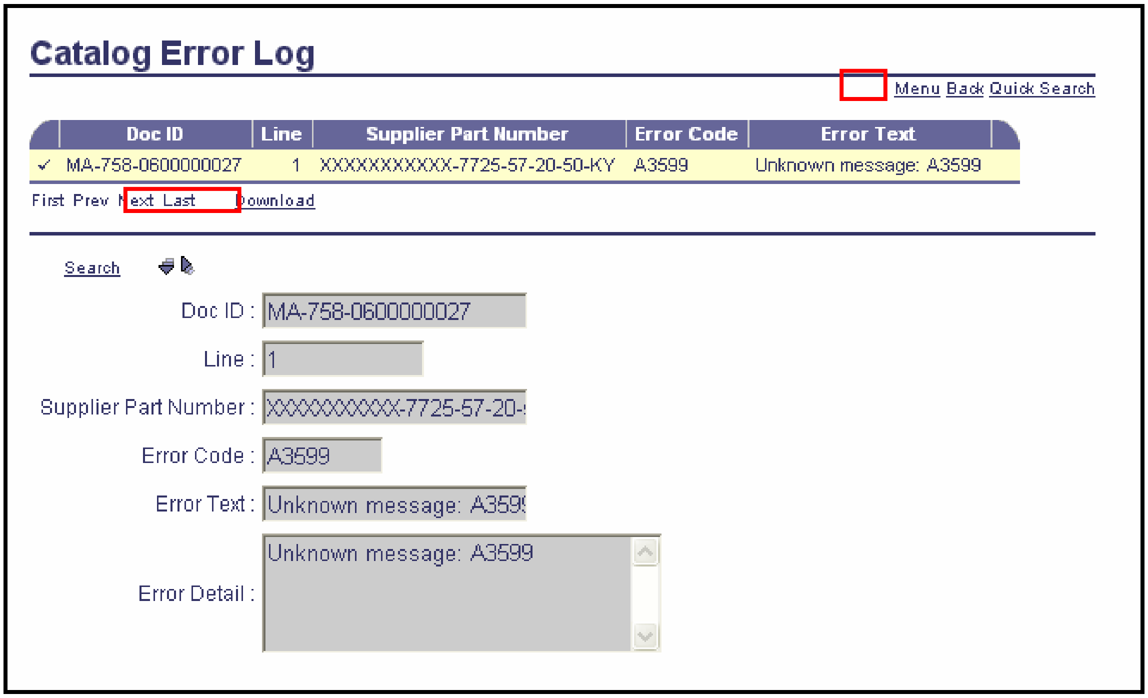
- **Catalog File**- Click **Browse** to find the Catalog Loading file you created.
- **Picture File**- Click **Browse** to find the **.zip** file of image referenced in the Catalog loading file.
- A **Load Type** must be chosen when loading Catalogs. The **Load Type** defines the type of catalog load the user will perform. Valid options for this field are:
  - "**Full**" - Choose this option if you want to replace all existing Catalog items or if you are doing an initial full load of new Catalog items. If performing a Full Load where there are preexisting records on the Catalog Maintenance table for the Commodity Line, then any items not included will be considered as deleted.
  - "**Incremental**" – Choose this option if you want to update only Catalog records that have changed since the last load. The same Excel Catalog file format is required. During the incremental load only those items that are new or have been changed will be loaded to the Catalog Maintenance table. Several different files may be loaded to the same MA line if the **Load Type** is "Incremental".

NOTE: If you are loading only picture files, the **Load Type** should be "Incremental".

- Clicking **Upload** will initiate the Catalog load process and check the catalog EXCEL file for errors.
- Clicking **Back** will transition the user back to the Commodity Section of the MA document.

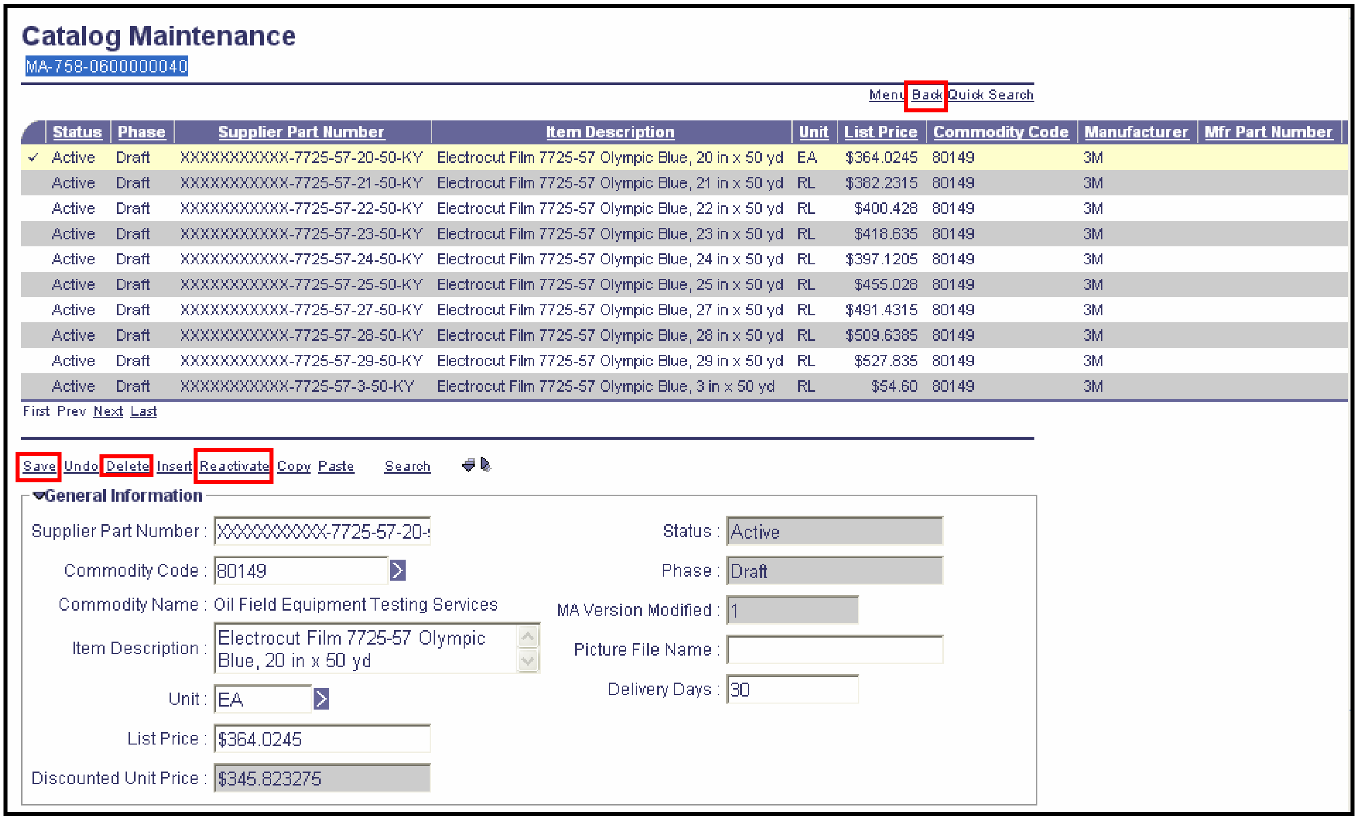
Once the Catalog Load job has been initiated click on the **Back** link to return to the Catalog Commodity line. When you have transitioned to the Catalog line you may track-down any errors on the Catalog Error log or you may inspect the Catalog that was loaded by clicking **View/Edit Catalog**

Click **Catalog Error Log** to inspect any errors on the **Catalog Error Log**.



- Click **Back** to return to the Catalog commodity line.
- Click **Download** to download all error messages to an MS-EXCEL file.

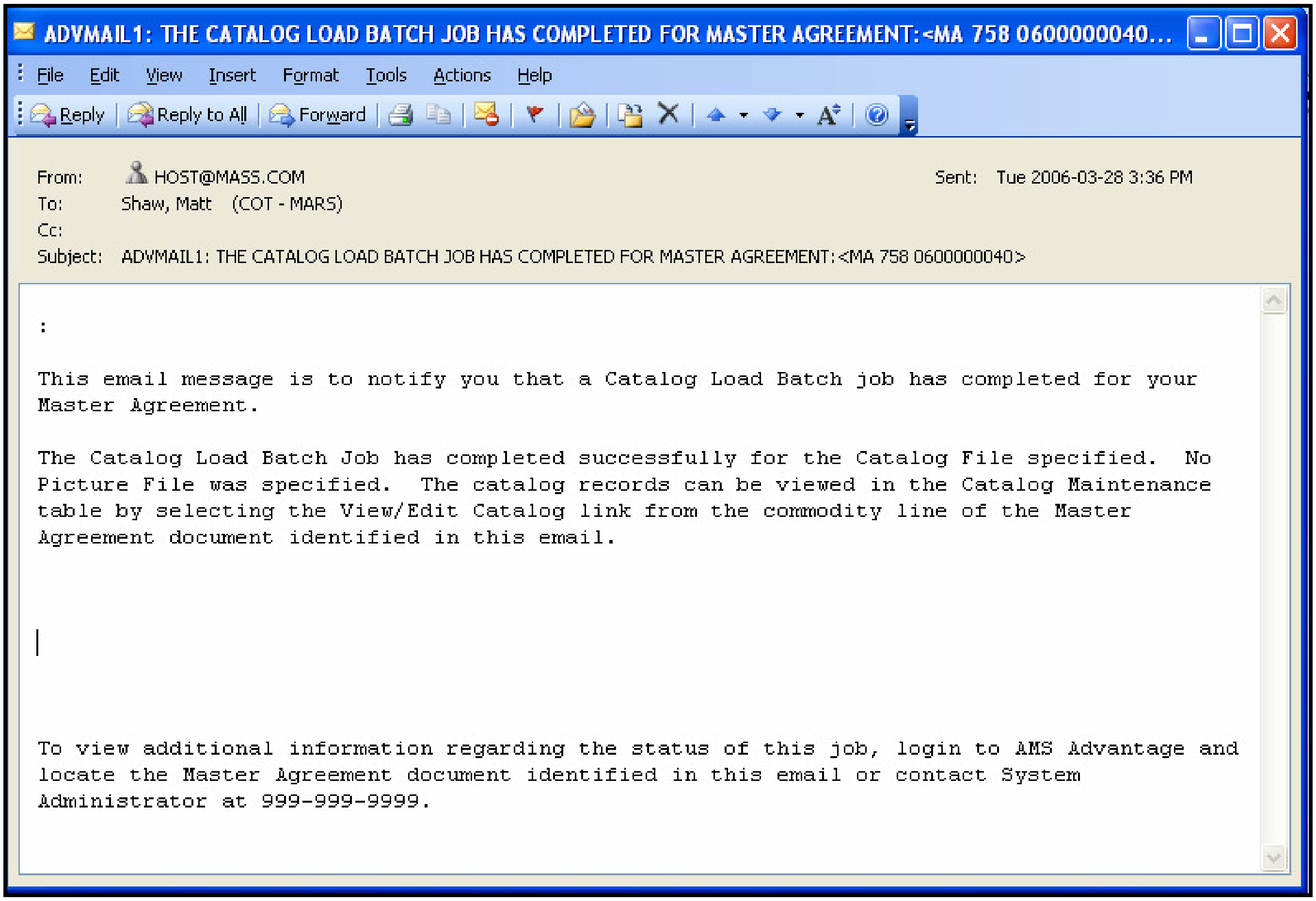
Click **View/Edit Catalog** to see those lines that were loaded by the bulk load process. You may edit records that have been loaded, as required.



Status	Phase	Supplier Part Number	Item Description	Unit	List Price	Commodity Code	Manufacturer	Mfr Part Number
✓ Active	Draft	XXXXXXXXXXX-7725-57-20-50-KY	Electrocut Film 7725-57 Olympic Blue, 20 in x 50 yd	EA	$364.0245	80149	3M	
Active	Draft	XXXXXXXXXXX-7725-57-21-50-KY	Electrocut Film 7725-57 Olympic Blue, 21 in x 50 yd	RL	$382.2315	80149	3M	
Active	Draft	XXXXXXXXXXX-7725-57-22-50-KY	Electrocut Film 7725-57 Olympic Blue, 22 in x 50 yd	RL	$400.428	80149	3M	
Active	Draft	XXXXXXXXXXX-7725-57-23-50-KY	Electrocut Film 7725-57 Olympic Blue, 23 in x 50 yd	RL	$418.635	80149	3M	
Active	Draft	XXXXXXXXXXX-7725-57-24-50-KY	Electrocut Film 7725-57 Olympic Blue, 24 in x 50 yd	RL	$397.1205	80149	3M	
Active	Draft	XXXXXXXXXXX-7725-57-25-50-KY	Electrocut Film 7725-57 Olympic Blue, 25 in x 50 yd	RL	$455.028	80149	3M	
Active	Draft	XXXXXXXXXXX-7725-57-27-50-KY	Electrocut Film 7725-57 Olympic Blue, 27 in x 50 yd	RL	$491.4315	80149	3M	
Active	Draft	XXXXXXXXXXX-7725-57-28-50-KY	Electrocut Film 7725-57 Olympic Blue, 28 in x 50 yd	RL	$509.6385	80149	3M	
Active	Draft	XXXXXXXXXXX-7725-57-29-50-KY	Electrocut Film 7725-57 Olympic Blue, 29 in x 50 yd	RL	$527.835	80149	3M	
Active	Draft	XXXXXXXXXXX-7725-57-3-50-KY	Electrocut Film 7725-57 Olympic Blue, 3 in x 50 yd	RL	$54.60	80149	3M	

- The **Back** link will transition you to the referenced Commodity line.
- The **Insert** link creates a blank Catalog record.
- The **Save** link retains any changes made to the selected record and check the record for errors.
- Selecting a record from the Grid and clicking on the **Delete** link will only physically delete records with a status of draft. For records with a status of Final, the record will be deactivated. This means that the item may no longer be ordered.
- The **Reactivate** link will may be used to re-activate in-active records.

When your Catalog has loaded successfully you will receive an e-mail notification.



Once the Catalog file has been loaded click **Validate** and then **Submit** the Master Agreement (**MA**).

After the Catalog indexing job has run and the MA effective date has passed, the items in the Catalog will be available for ordering from the **URCATS** page.

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Exercise 5 – Process a Master Agreement to load a Catalog (MA)

Scenario

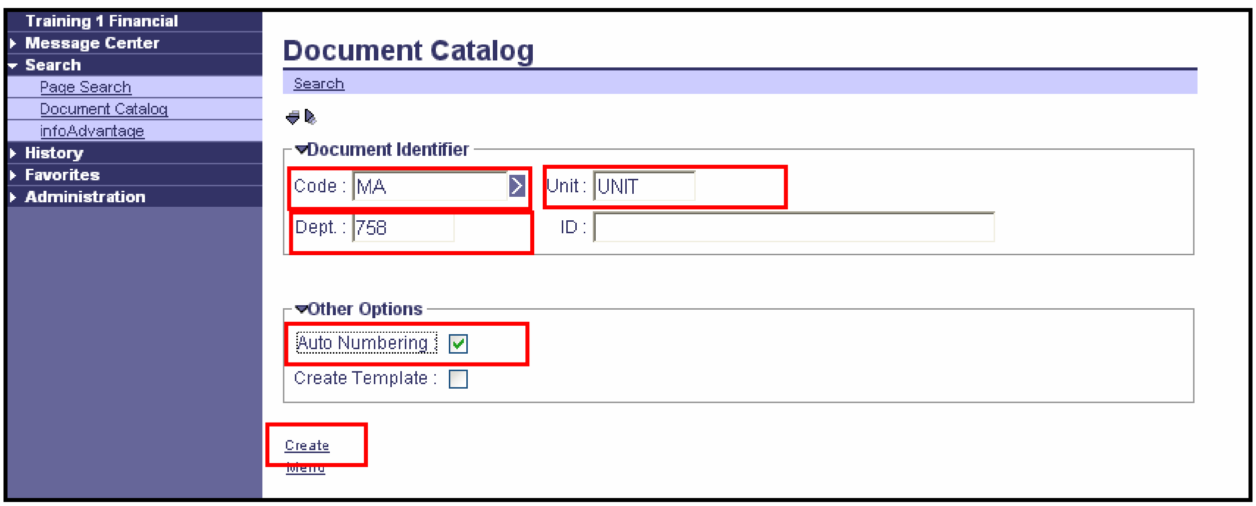
You need to create a Catalog for Food Items for the Cafeteria to place replenishment orders.

Task Overview

As the central Buyer you need to create a stand-alone Master Agreement from your Procurement Workspace. Pick the correct Procurement Type and Cited Authority. Establish Effective and Expiration dates as well as the renewal periods. You will set this agreement up as an all-state-agency Master Agreement and create a Primary Vendor Line. After adding a Single Commodity Line, assign it a line type of Catalog. You will then load an MS-EXCEL file with catalog lines. After the file is loaded you Validate and Submit the Master Agreement.

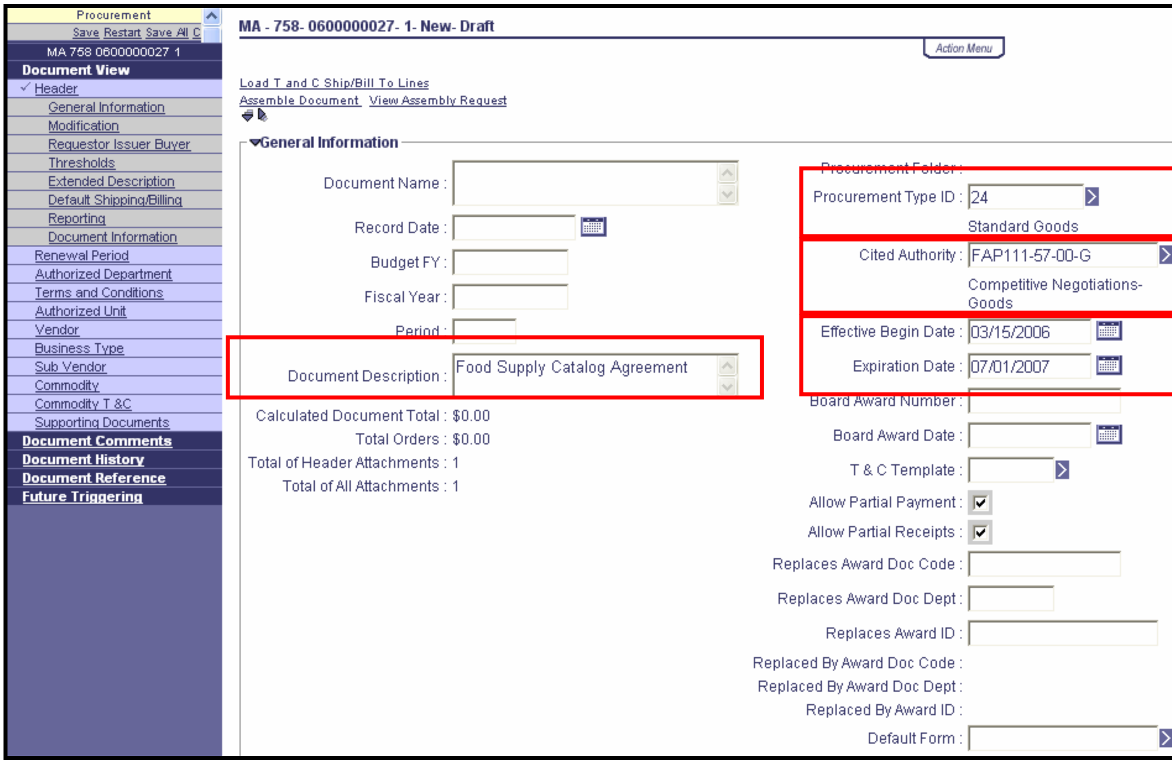
Procedures

1. Click **Home**
2. Click **Search** from the Secondary Navigation Panel. Click **Document Catalog.** Switch into "Create Mode" by clicking **Create.**



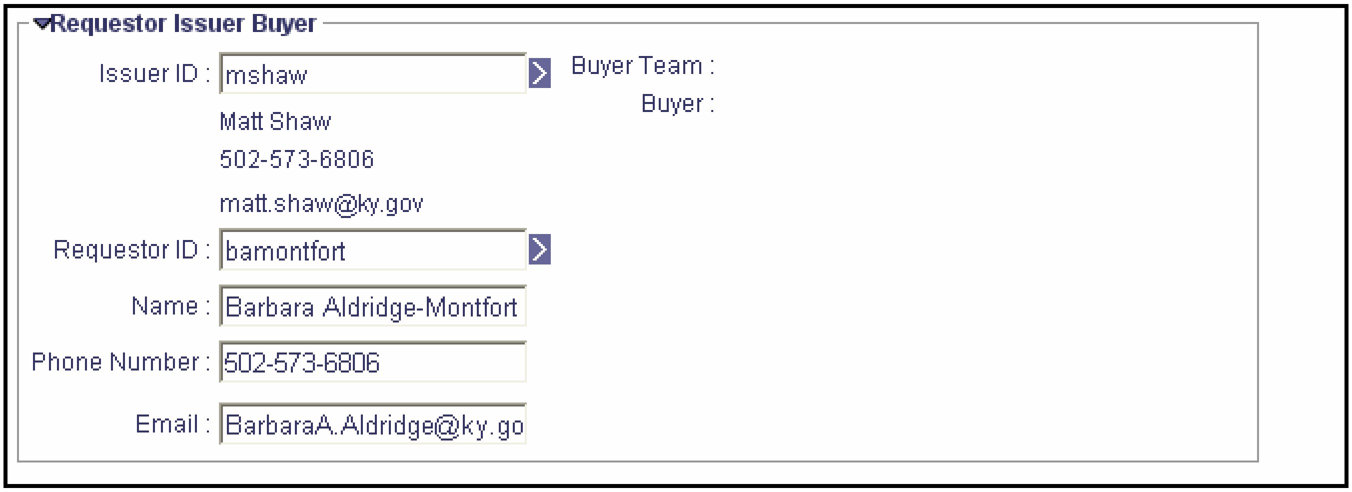
Required Fields	Values
CODE	Enter: "**MA**"
Award Department	Enter: **Document department from your Student Card**
Unit	Enter: "**Unit**"
Auto Numbering	**Click to Select**

3. Click **Create** and the Master Agreement opens to the **Header** section.
4. Complete the following required fields in the **Header** section.



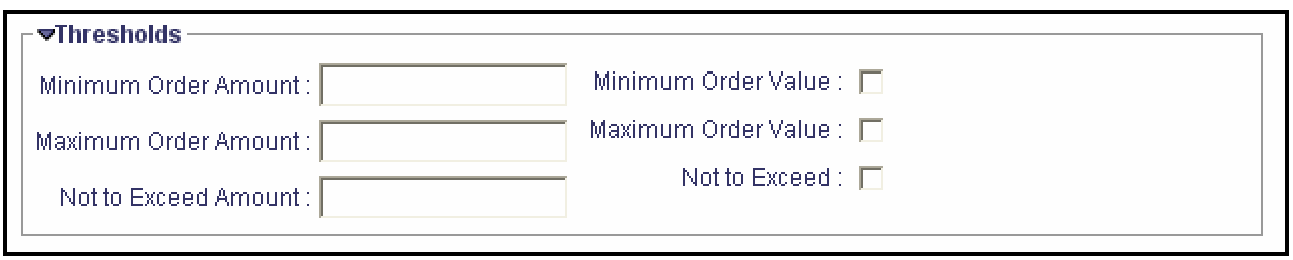
Required Fields	Values
Document Description	**Food Supply Catalog Agreement**
Procurement Type ID	**24** – select from Pick List
Cited Authority	**FAP 111-57-00-G**
Budget FY	Leave blank
Fiscal Year	
Period	
Effective Begin Date	**Today's Date**
Expiration Date	**Tomorrow's Date**

5. Complete the **Requestor Issuer Buyer** Section.



Required Fields	Values
Issuer ID	Leave as is
Requestor ID	**Select your Student ID from the Pick List**

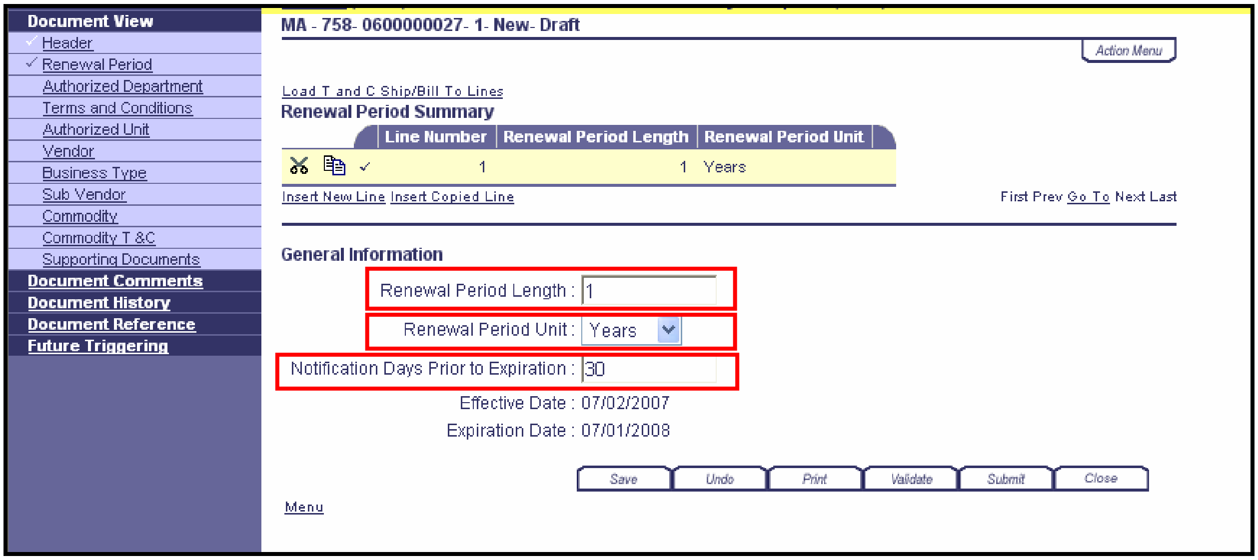
7. Complete the **Thresholds** Section.



Required Fields	Values
Minimum Order Value	Leave Blank
Minimum Order Amount	Leave blank
Maximum Order Value	Leave Blank
Maximum Order Amount	Leave Blank
Not to Exceed	**Click on the check-box to Select**
Not to Exceed Amount	Enter **1000000.00**

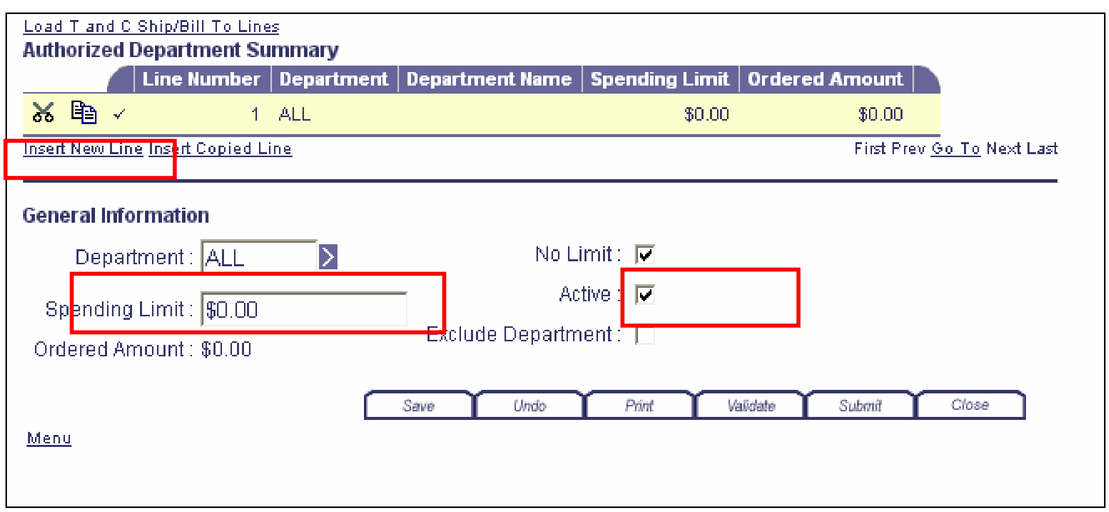
6. The **Extended Description** Field is optional.
7. Click **Renewal Period** on the Secondary Navigation Panel.

8. Click **Insert New Line**.



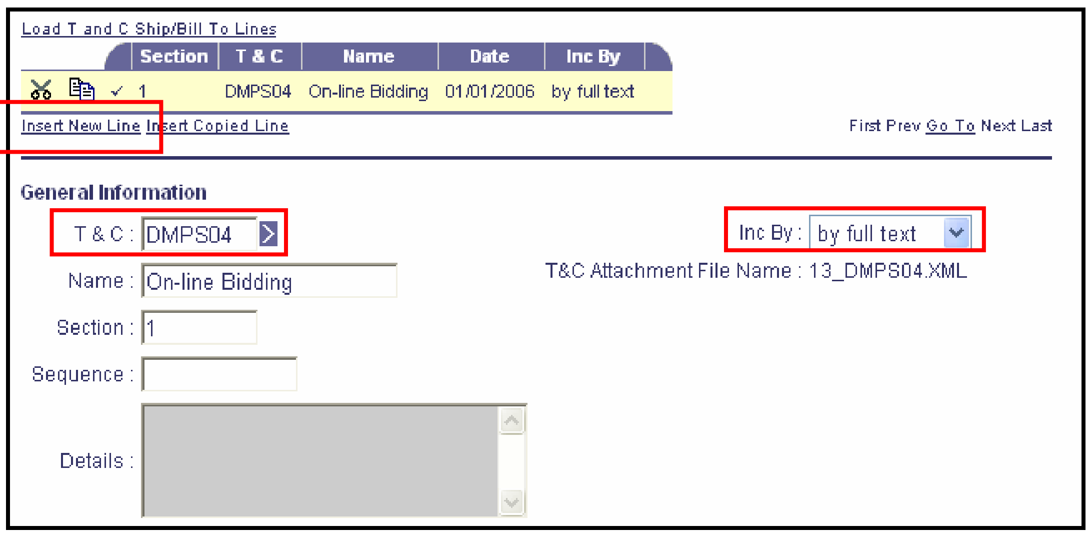
Required Fields	Values
Renewal Period Length	**1**
Renewal Period Unit	**Years**
Notification Days Prior to Expiration	**1**
Effective Date	Leave Blank
Expiration Date	Leave Blank

9. Click **Authorized Department** on the Secondary Navigation panel. Click **Insert New Line.**



Required Fields	Values
Department	Enter: **All**
Spending Limit	Leave at zero
No Limit	Leave as Selected

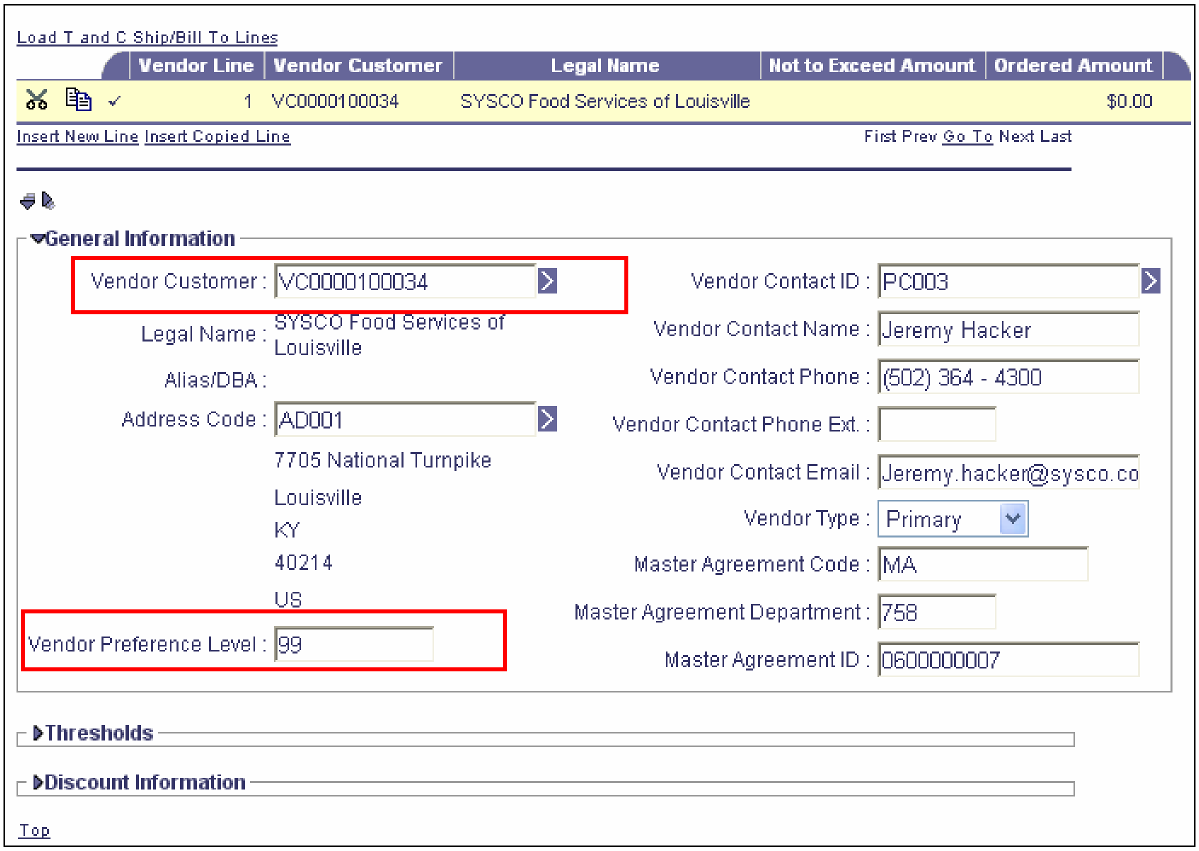
12. Click **Terms and Conditions** on the Secondary Navigation Panel. Go to the Terms and Conditions Section and click **Insert New Line**.



Required Fields	Values
T&C	**Select DMPS04**
Section	Enter “**1**”

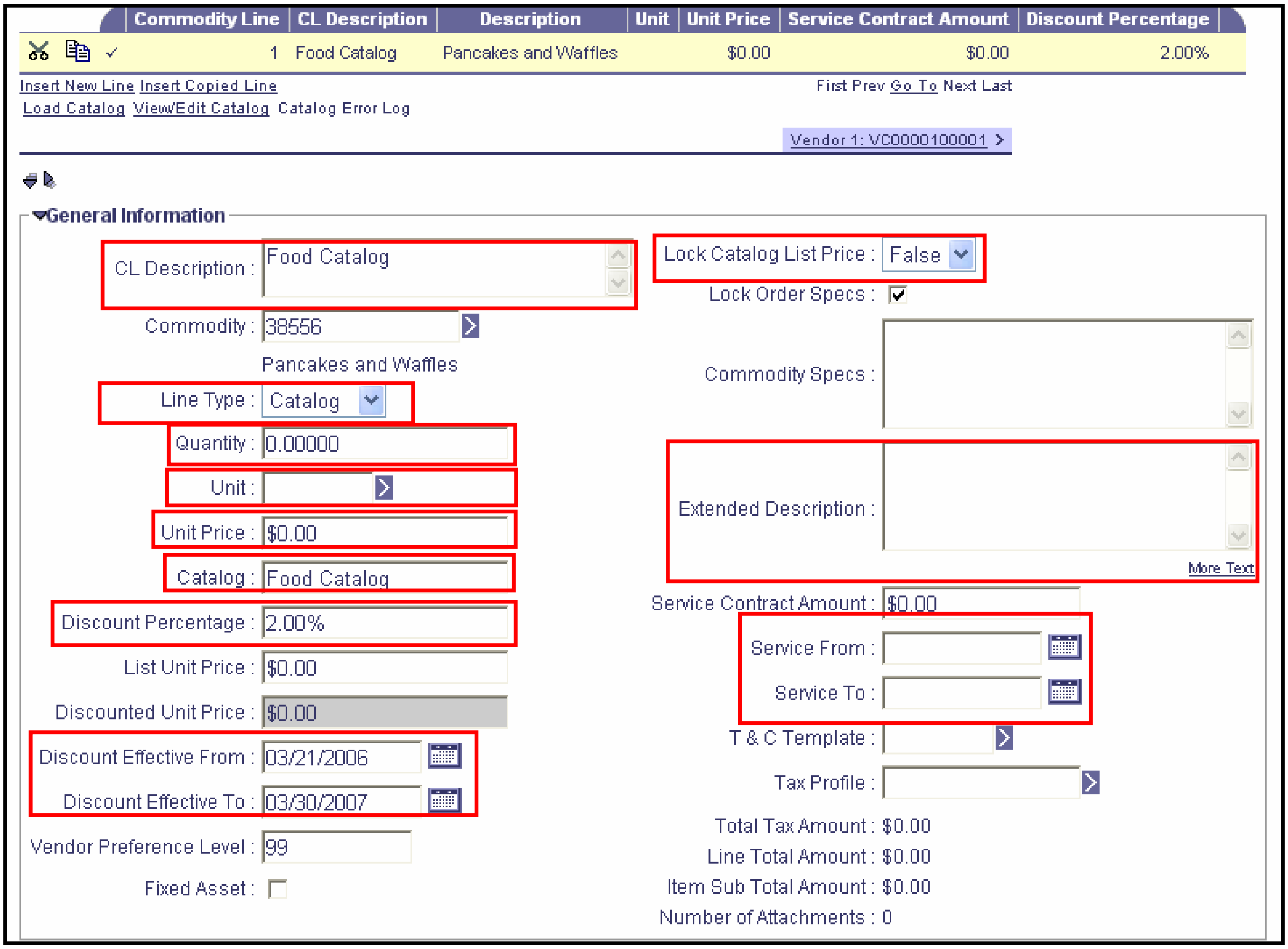
Click **Save** to populate the default Terms and Conditions information.

13. Click **Vendor** on the Secondary Navigation Panel. Click **Insert New Line**.



Required Fields	Values
Vendor Customer	Select **VC0000100034**
Vendor Preference Level	Leave as is

14. Click **Commodity** on the Secondary Navigation Panel. Click **Insert New Line**.



Required Fields	**Values**
CL Description	**Food Catalog**
Commodity	**38556**
Line Type	**Catalog**
Quantity	Leave blank
Unit	Leave blank
Unit Price	Leave blank
Service Contract Amount	Leave blank
Catalog	Enter: '**Food Catalog**'
Discount Percentage	Enter "**2**"
Discount Effective From	**Today's date**
Discount Effective To	**July 7, 2008**
Lock Catalog List Price	**False**

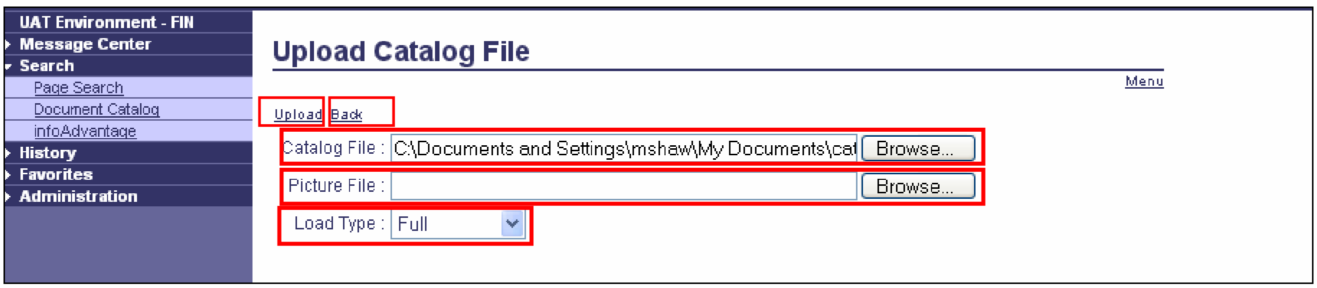
Required Fields	Values
Lock Order Specs	**Select the checkbox**
Extended Description	Enter: "**Catalog Agreement for Cafeteria food supply**"

15. For Catalog Lines, Load the Catalog .XLS file.

16. Format and prepare the Catalog File. Download the file from the eMARS website at: http://finance.ky.gov/internal/eMARS/forms/sysco_cat.xls. Save the file to your Windows desktop.

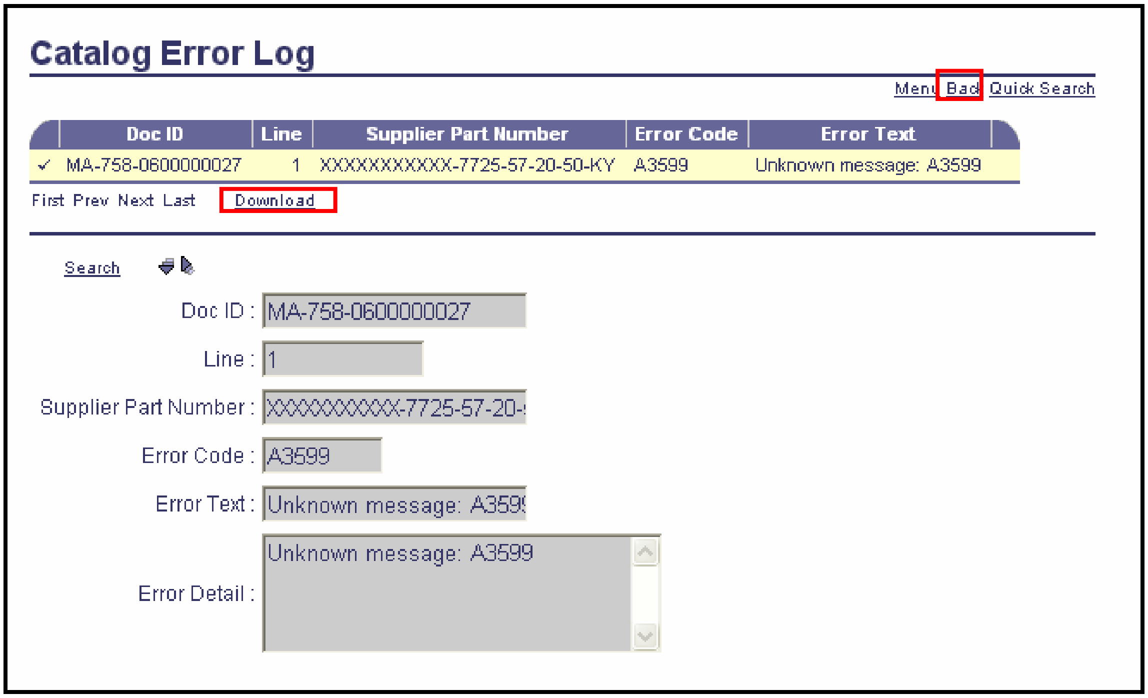
17. Click **Save** to activate the **Load Catalog** link.

18. Click **Load Catalog** to start the loading process. The **Upload Catalog File** page opens.

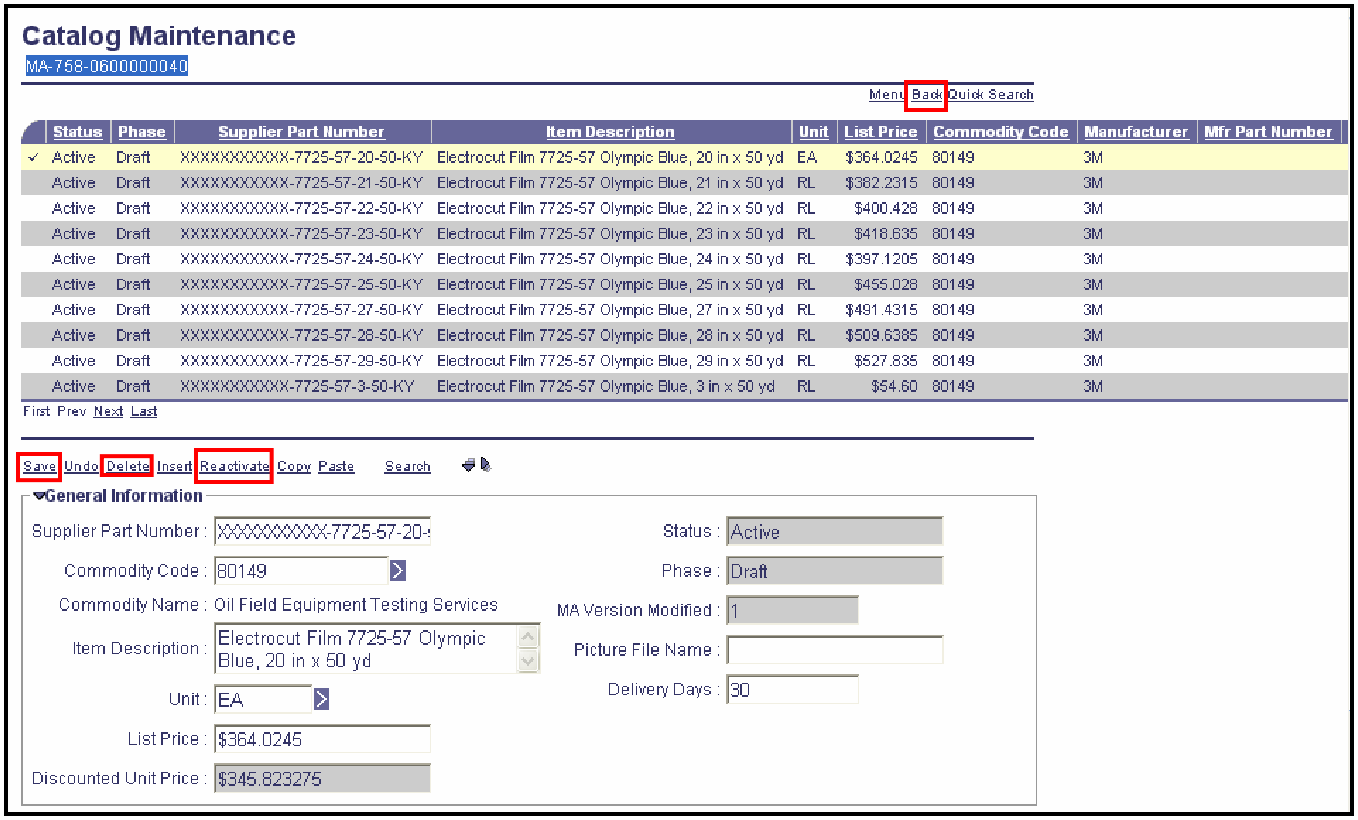


Fields	Values
Catalog File	Click Browse for your file: "**SYSCO_CAT.XLS**"
Picture File	Leave blank
Load Type	Select: **Full**

19. Click **Upload** to initiate the Catalog load process and check the catalog EXCEL file for errors.
20. Once the Catalog Load job has been initiated, click **Back** to return to the Catalog Commodity line.
21. If there had been any errors in the catalog load, the option to Click **Catalog Error Log** would be available to inspect any errors encountered during the Catalog load.



22. If there had been errors, you would click the **Download** link to download all error messages to an MS-EXCEL file and then click the **Back** link to return to the Catalog commodity line.
23. Click **View/Edit Catalog** to see those lines that were loaded by the bulk load process. You may edit records that have been loaded, as required.
24. Click the **Back** to return to your document



Catalog Maintenance
MA-758-0600000040

Menu Back Quick Search

	Status	Phase	Supplier Part Number	Item Description	Unit	List Price	Commodity Code	Manufacturer	Mfr Part Number
✓	Active	Draft	XXXXXXXXXXX-7725-57-20-50-KY	Electrocut Film 7725-57 Olympic Blue, 20 in x 50 yd	EA	$364.0245	80149	3M	
	Active	Draft	XXXXXXXXXXX-7725-57-21-50-KY	Electrocut Film 7725-57 Olympic Blue, 21 in x 50 yd	RL	$382.2315	80149	3M	
	Active	Draft	XXXXXXXXXXX-7725-57-22-50-KY	Electrocut Film 7725-57 Olympic Blue, 22 in x 50 yd	RL	$400.428	80149	3M	
	Active	Draft	XXXXXXXXXXX-7725-57-23-50-KY	Electrocut Film 7725-57 Olympic Blue, 23 in x 50 yd	RL	$418.635	80149	3M	
	Active	Draft	XXXXXXXXXXX-7725-57-24-50-KY	Electrocut Film 7725-57 Olympic Blue, 24 in x 50 yd	RL	$397.1205	80149	3M	
	Active	Draft	XXXXXXXXXXX-7725-57-25-50-KY	Electrocut Film 7725-57 Olympic Blue, 25 in x 50 yd	RL	$455.028	80149	3M	
	Active	Draft	XXXXXXXXXXX-7725-57-27-50-KY	Electrocut Film 7725-57 Olympic Blue, 27 in x 50 yd	RL	$491.4315	80149	3M	
	Active	Draft	XXXXXXXXXXX-7725-57-28-50-KY	Electrocut Film 7725-57 Olympic Blue, 28 in x 50 yd	RL	$509.6385	80149	3M	
	Active	Draft	XXXXXXXXXXX-7725-57-29-50-KY	Electrocut Film 7725-57 Olympic Blue, 29 in x 50 yd	RL	$527.835	80149	3M	
	Active	Draft	XXXXXXXXXXX-7725-57-3-50-KY	Electrocut Film 7725-57 Olympic Blue, 3 in x 50 yd	RL	$54.60	80149	3M	

First Prev Next Last

Save Undo Delete Insert Reactivate Copy Paste Search

General Information

Supplier Part Number : XXXXXXXXXXX-7725-57-20-
Commodity Code : 80149
Commodity Name : Oil Field Equipment Testing Services
Item Description : Electrocut Film 7725-57 Olympic Blue, 20 in x 50 yd
Unit : EA
List Price : $364.0245
Discounted Unit Price : $345.823275
Status : Active
Phase : Draft
MA Version Modified : 1
Picture File Name :
Delivery Days : 30

25. Once the catalog file has been loaded **Validate** your document.

To Assemble:

9 From the Header Section click on **Assemble Document**
10 Click **Submit Assemble Request**
11 Click on **Refresh**, You should see the status as Successful (You may have to click refresh a few times before the assembly job finishes and you see a Successful Status).
12 Click **Back** to return to the document

To Print the Assembled Form:

4 Return to **Header**
5 From the **Action Menu**, select **Attachments**.

Download the document to Print.

26. **Submit** the document to initiate workflow for approval.

27. After the Catalog indexing job has run, and the MA effective date has passed, the items in the Catalog will be available for ordering from the URCATS page.

NOTE: Please write the MA Document ID on your Student Card. You will need it in the next exercise.

9 –Renewing a Master Agreement

In eMARS a Renewal (**RN**) document must be processed in order to activate the Renewal Periods that were initially set-up on the Master Agreement (**MA**). The most important part of the renewal is setting up new Effective and Expiration Dates. The Renewal (**RN**) document may also be used to establish blanket price changes or line by line price changes.

NOTE: Price changes will not automatically be applied to items in a Catalog. It will be the responsibility of the Buyer to change prices in the Catalog and reload the modified version of the file.

Renewal Processing has four distinct steps in eMARS.

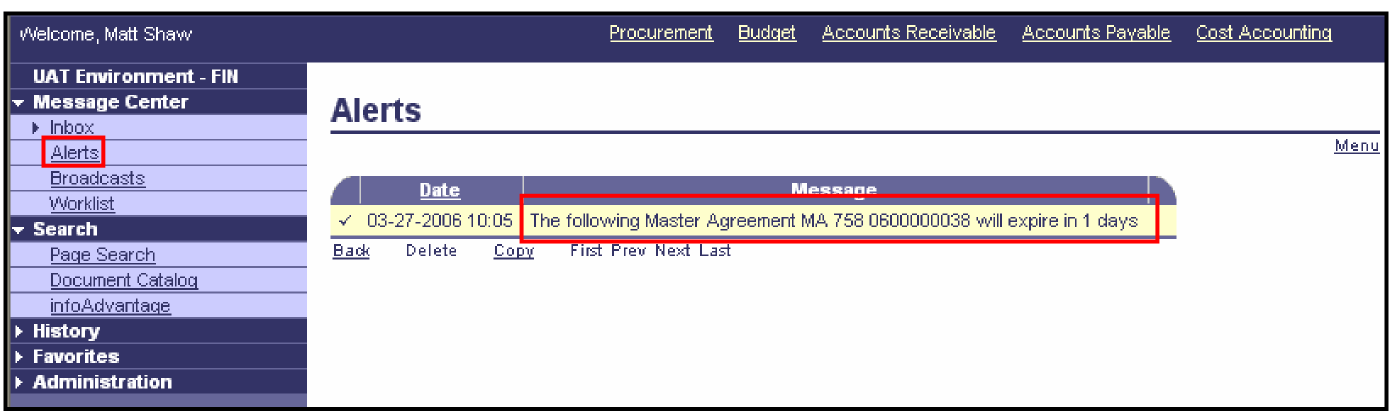
1. Establish the Renewal Periods as part of the terms of the Master Agreement (**MA**);
2. Receive notification that a Master Agreement (**MA**) is about to expire within the numbers of days defined on the MA renewal period;
3. **Copy Forward** from **MA** to Renewal (**RN**) document to establish the Renewal Period and any price changes; and submit the Renewal (**RN**).
4. Process the Master Agreement (**MA**) modification that is generated from the Renewal Batch job.

An RN document may be created by **Copying Forward** from the Master Agreement (**MA**) requiring renewal.

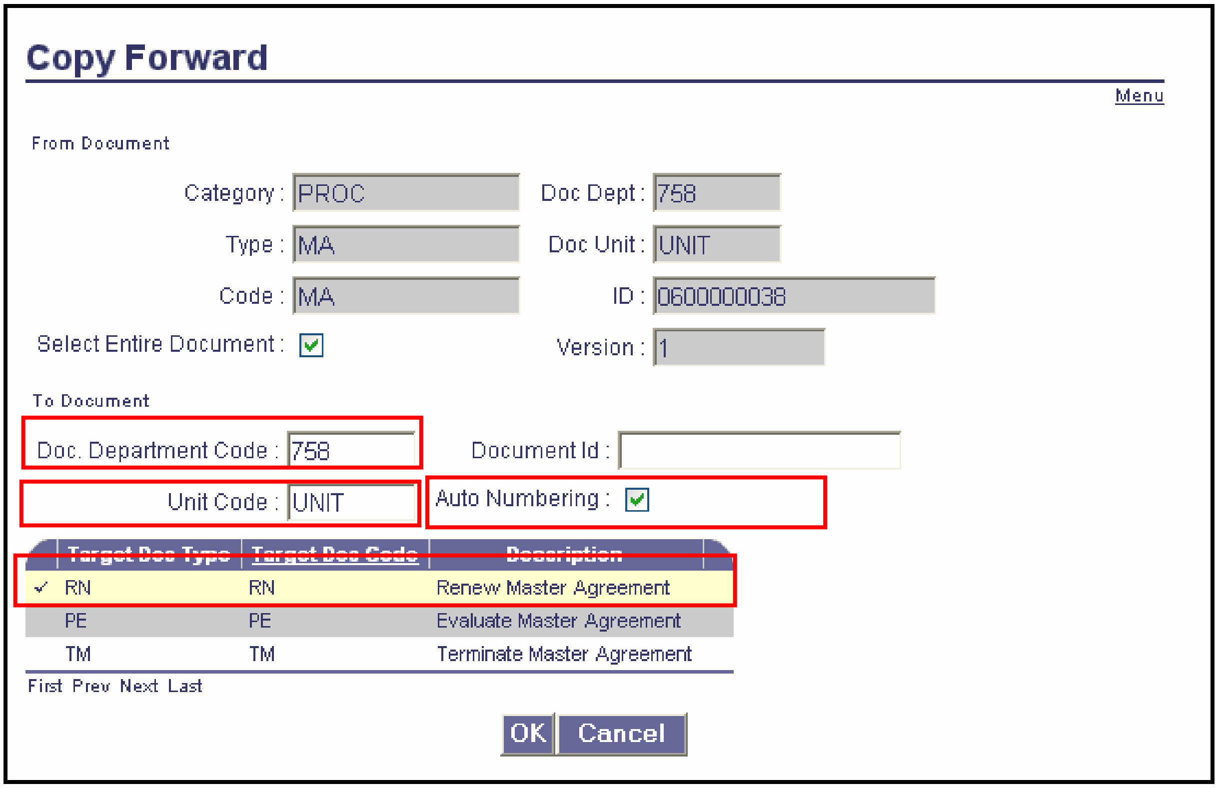
Renewing a Master Agreement.

Establish Renewal Periods on the Master Agreement (**MA**) as defined on the Master Agreement created in Exercise 5.

On a daily basis you should check your eMARS Message Center>>Alerts for new Master Agreement Renewal notification messages.



Access the Master Agreement (**MA**) that is about to expire from the **Document Catalog** by going to the **Home** action button and then selecting the **Search** link and clicking the **Document Catalog. Copy Forward** to an **RN** document by opening the **MA** and scrolling to the bottom and clicking the **Copy Forward** action button.

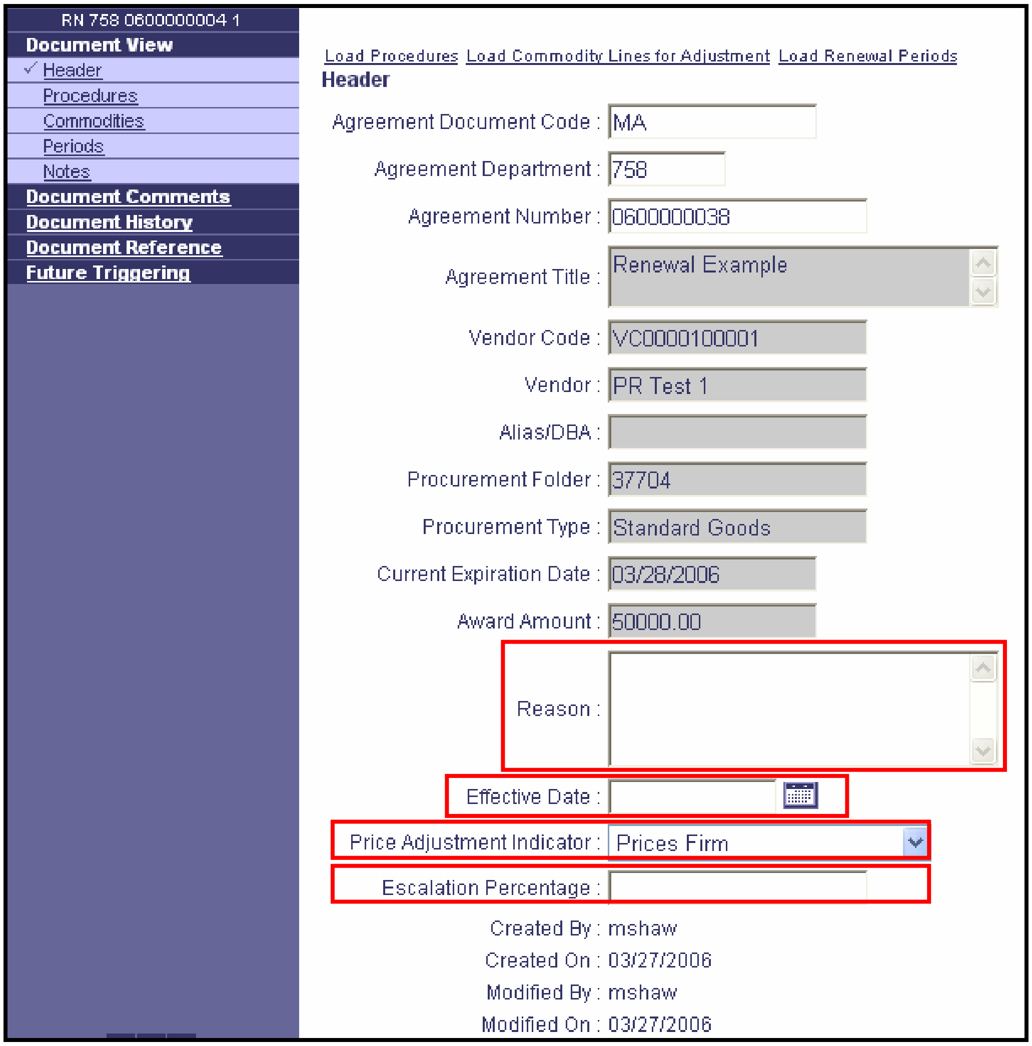


Select the **RN** entry in the grid and provide the following:

- Your **Doc. Department Code**
- Your **Unit Code**
- Select the **Auto Numbering** check-box so that eMARS will use the next available incremental number when generating the Renewal (**RN**) Document's **DOC_ID.**

When you click **OK** the Renewal (**RN**) document will open to the header section.

Complete the Renewal (**RN**) Document Header**.**



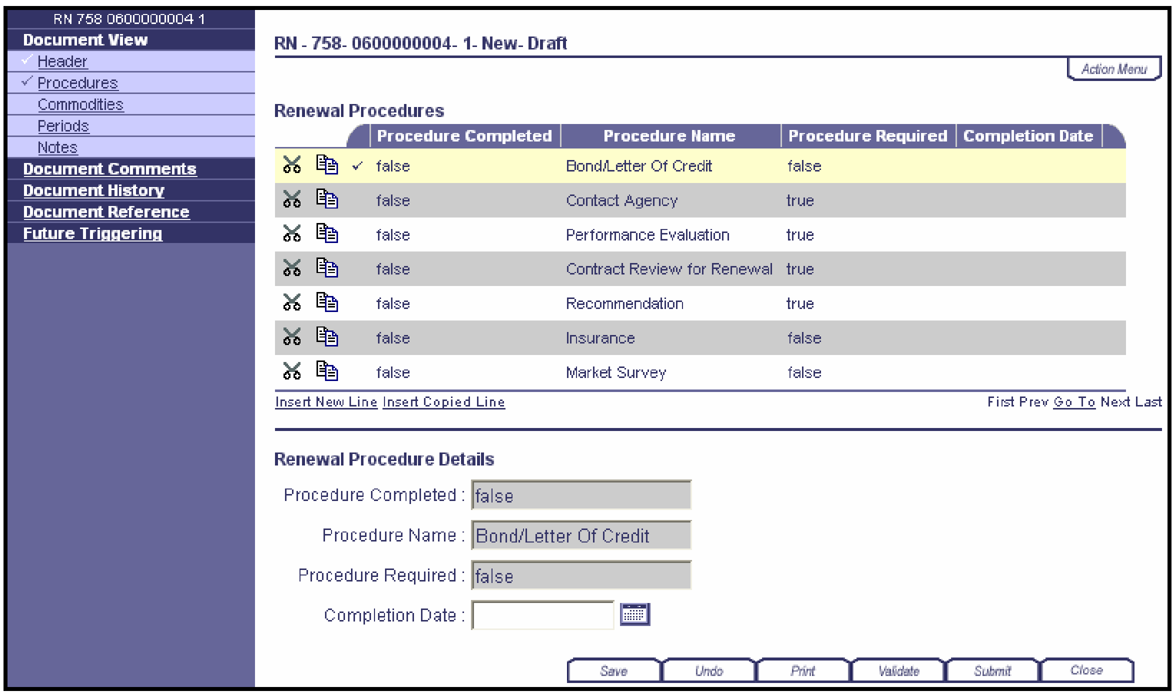
- The **Reason** field allows you to provide brief documentation of why the **MA** should be renewed. (Required)
- The **Effective Date** field of the Renewal (**RN**) document is used to determine when the Master Agreement modification should be created. (Required) This should **NOT** be the date the Master Agreement (**MA**) modification will be effective. It must be generated in advance to allow for the approval of the modification. The date of preparation of the Renewal (**RN**) document should generally be used.
- The **Price Adjustment Indicator** field is used to determine how / if the line items should have price adjustments made automatically when the **RN** is processed. Valid values are:
  - **Prices Firm**- no automated changes.
  - **Line Adjustments Required** - All Commodity lines on the Master Agreements (**MA**) will be loaded into the Renewal (**RN**) Document for the Buyer to make line by line changes.

- ○ **Price Escalation Percentage** - If selected then the **Escalation Percentage** field is required and lines will be adjusted on the Master Agreement (**MA**) modification based on this value.

- The **Escalation Percentage** is the increase/decrease that is applied to the current master Agreement (**MA**) price list on a Renewal (**RN**). This is entered as a whole number without using the %.

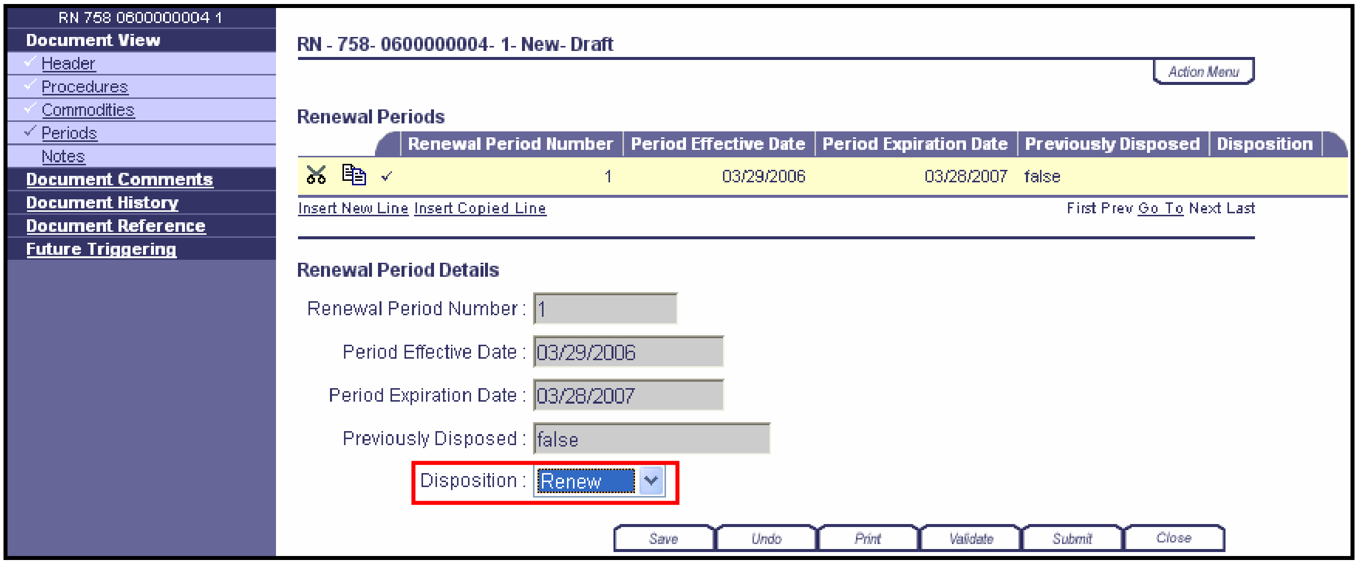
Click on the **Load Procedures** and **Load Renewal Periods** links.

Click **Procedures** in the Secondary Navigation Panel and complete the **Document Procedures** Section. Document when all mandatory Procedures were completed by entering the **date** on which they were completed. Procedures are recommended tasks that be performed as part of the Master Agreement (**MA**) renewal process. Navigate to each procedure by clicking on the **bar** to highlight it which refreshes the details shown below for addition of the **Completion Date**.



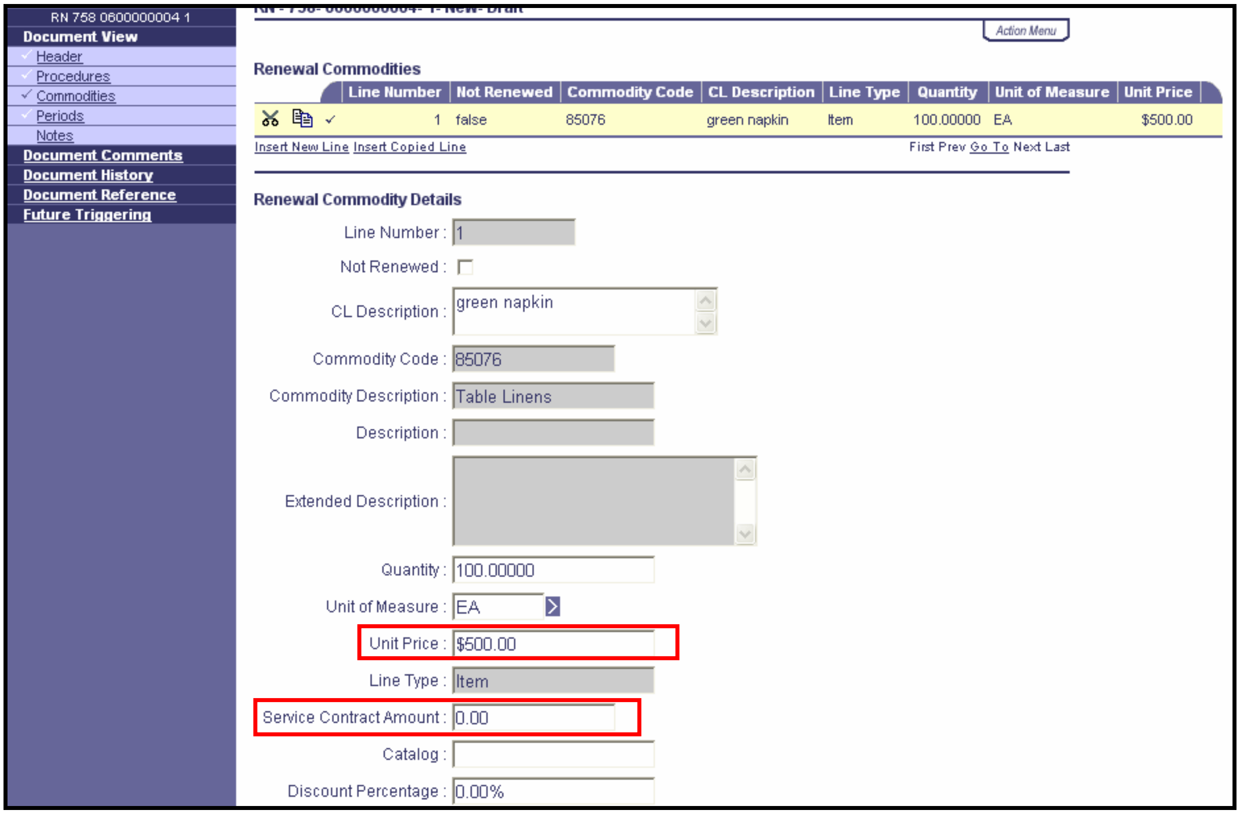
- For each Required Procedure, you will have to record a **Completion Date**.

Click **Periods** in the Secondary Navigation Panel. This panel lists all the remaining Renewal Periods on the Master Agreement (**MA**). You must select a disposition for the closest Renewal period.



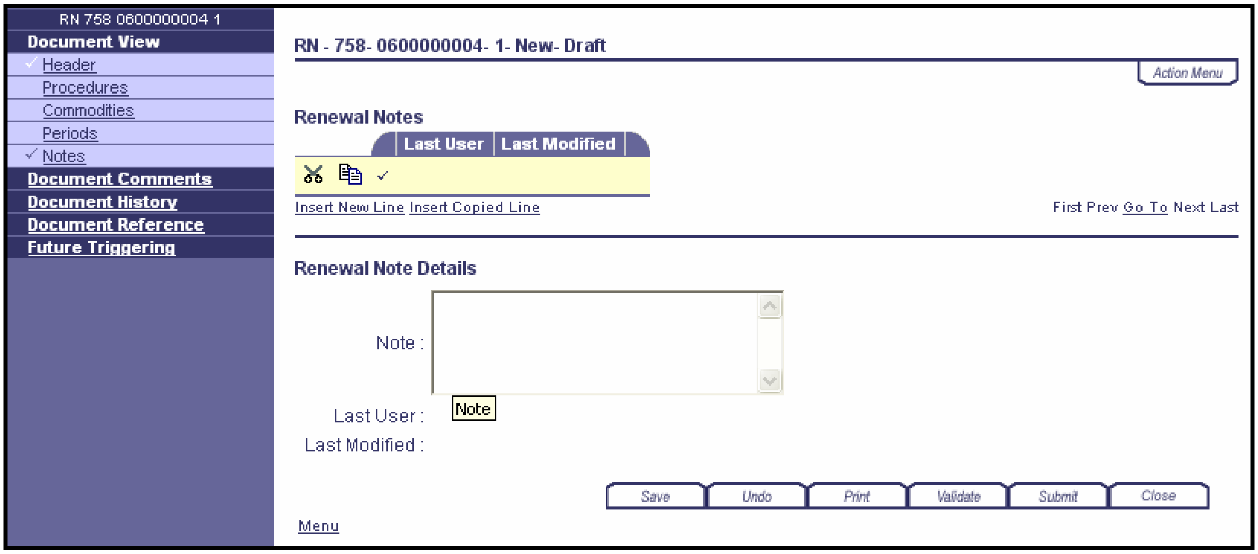
- The type(s) of **Disposition** are: **Renew, Lapse, or Reprocure.** If you choose "**Lapse**" or "**Reprocure**" then you are effectively closing out the Master Agreement (**MA**) when the Expiration Date passes. If you choose "**Renew**" then the Effective and Expiration Dates in the Master Agreement (**MA**) header will be set to **Period Effective Date** and **Period Expiration Date** listed on this page for the Renewal Period in question.

Click **<u>Commodities</u>** in the Secondary Navigation Panel. This step is only required if you are manually adjusting the prices on each Master Agreement (**MA**) Commodity line.



- Enter the modified **Unit Price** in this field for the post Renewal price; or
- Adjust the **Service Contract Amount** in this field for the Post Renewal Contract/ Lump Sum Amount. This value is only applicable to Master Agreement Commodity lines with a **Line Type** of “**Service**”; or
- For Line Types “**Catalog**” and “**Discount**”, you may adjust the **Discount Percentage** value.

Click **Notes** on the Secondary Navigation Panel to access a page where you may record any Notes about the decision process to renew or not renew the Master Agreement (**MA**). (Optional)

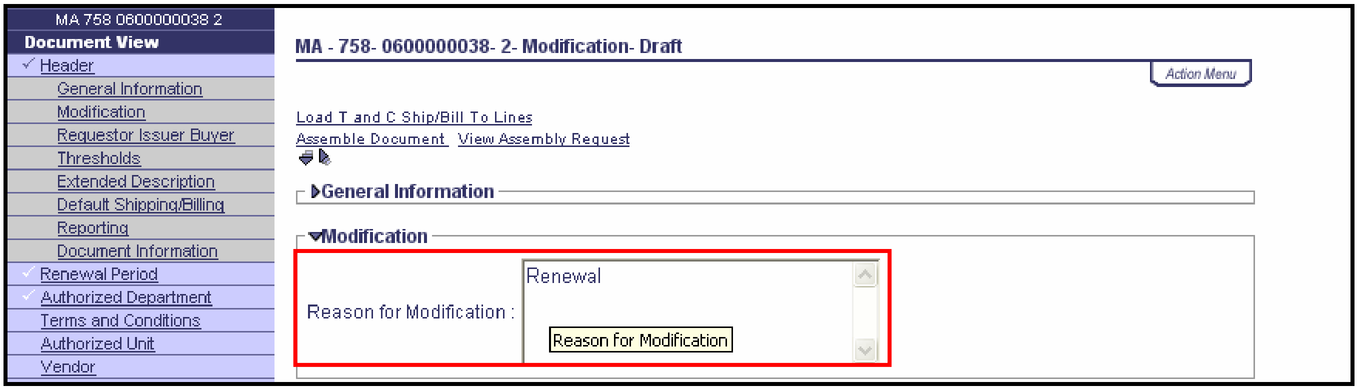


- Record any documentation of the Renewal process in the **NOTE** field.

Step 10: Click **Validate** and then **Submit** the Renewal (**RN**) Document.

(A batch job must be run at this point to continue the exercise.)

On the night of the **Renewal Effective Date**, the Renew Master Agreement Batch Job will automatically create a Master Agreement (**MA**) modification using the information from this document. You may make additional changes to **Terms and Conditions** as required.



- The **Reason for Modification** field will default to the word **Renewal**. Please provide a more meaningful reason, if possible.

Validate and then **Submit** the Master Agreement (**MA**) Modification.

Exercise 6 – Process a Master Agreement Renewal

Scenario

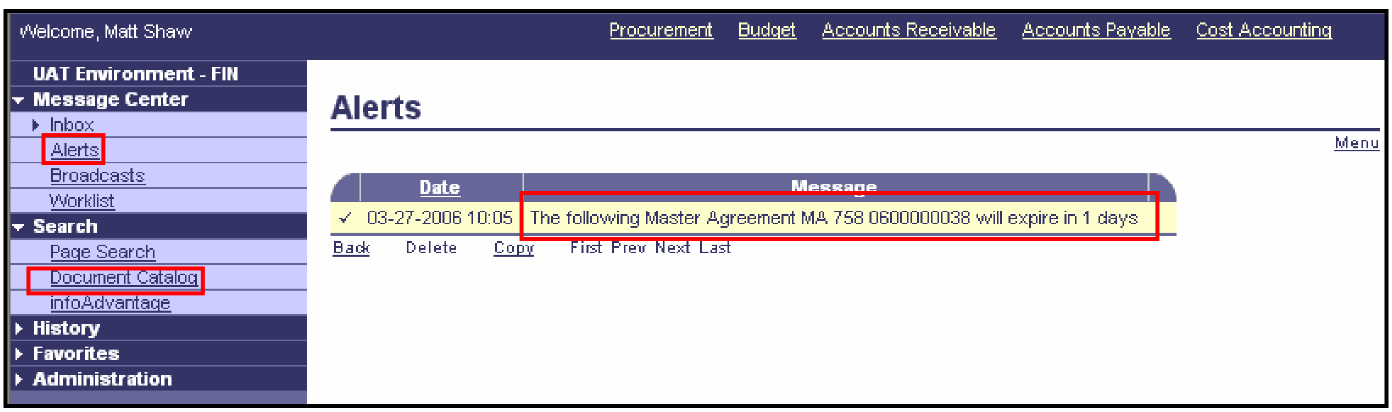
The Master Agreement you created for the food catalog is about to expire. You would like to Renew the agreement because the Vendor has performed well.

Task Overview

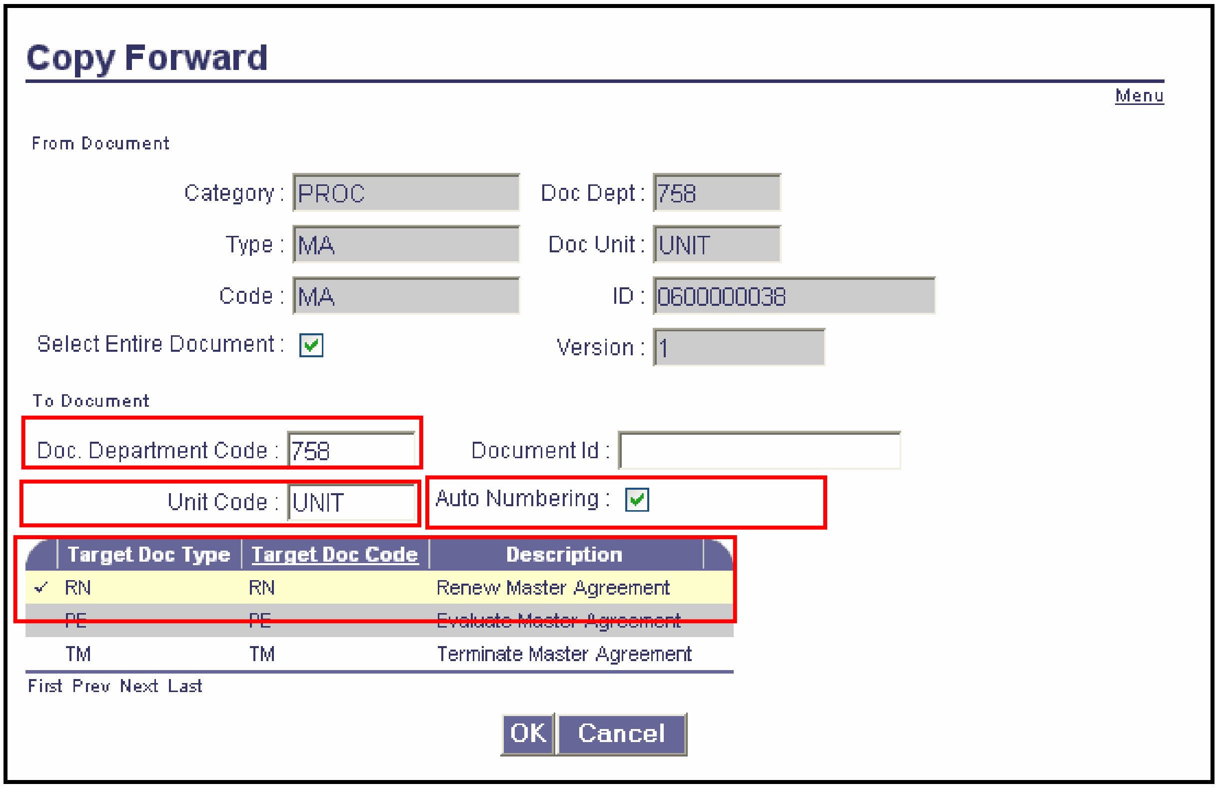
Access the Master Agreement you created in Exercise 5 and Copy Forward to a Renewal Document. On the Renewal Document you will complete the Header, Document Procedures, Renewal Periods and the Notes section. After you process the Renewal Document a Master Agreement modification document will be created by the nightly batch cycle and submitted to workflow.

Procedures

1. Open **Message Center** from the Secondary Navigation panel, click **Alerts** to look for new Master Agreement Renewal notification messages. You should check your alerts daily. For training purposes an alert will not be generated.

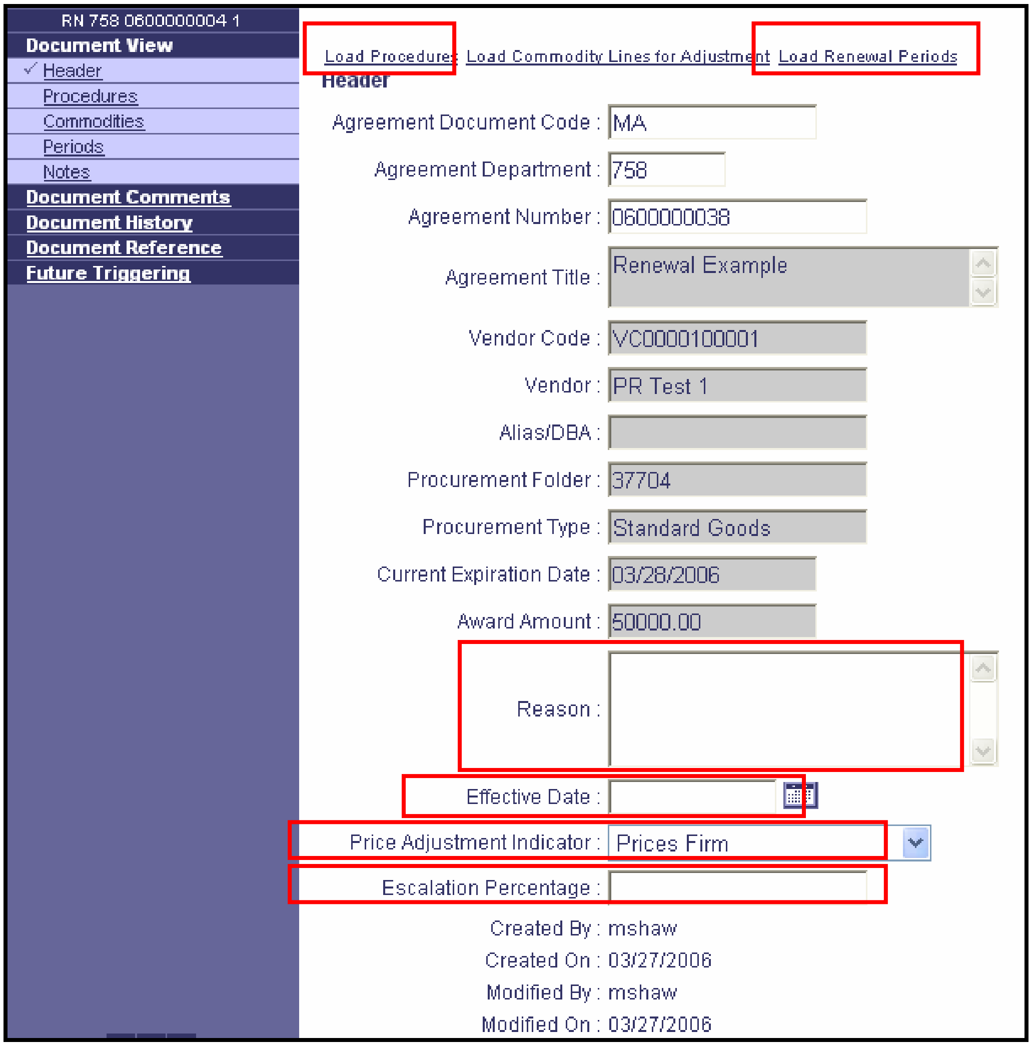


2. Click **Search** in the Secondary Navigation Panel and **Document Catalog.** Enter the **Document Code**, **Document Department** and **Document ID** for the **MA** you created in Exercise 5.
3. Open the Master Agreement (**MA**), click **Copy Forward**. The **Copy Forward** page opens.
4. Select the **RN** Row in the Grid Section for the Target document.



Required Fields	Values
Doc Department Code	Enter **The Department code from your Student Card**
Unit code	Enter “**UNIT**”
Auto numbering	**Click to Select**

5. Complete the Renewal Document **Header**.



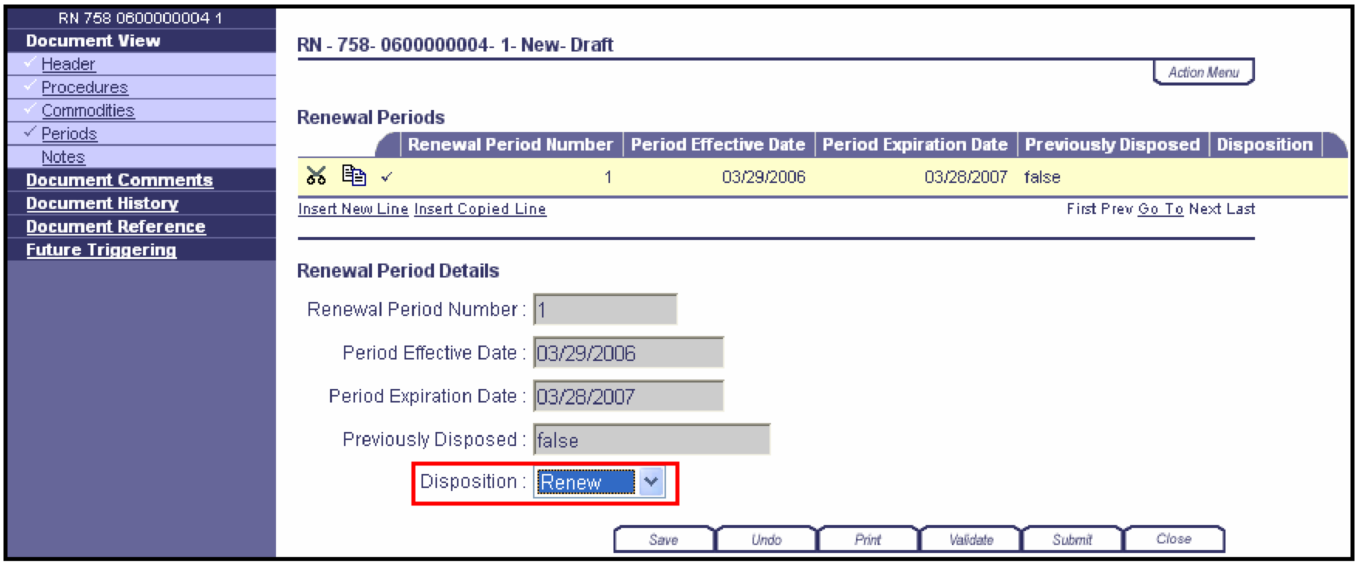
Required Fields	Values
Reason	Enter **Great contract pricing**
Effective Date	**Today's Date**
Price Adjustment Indicator	**Prices Firm**
Escalation Percentage	**Leave Blank**

6. Click **Load Procedures** and **Load Renewal Periods** links.

7. Click **Procedures** in the Secondary Navigation Panel and complete the **Document Procedures** section.

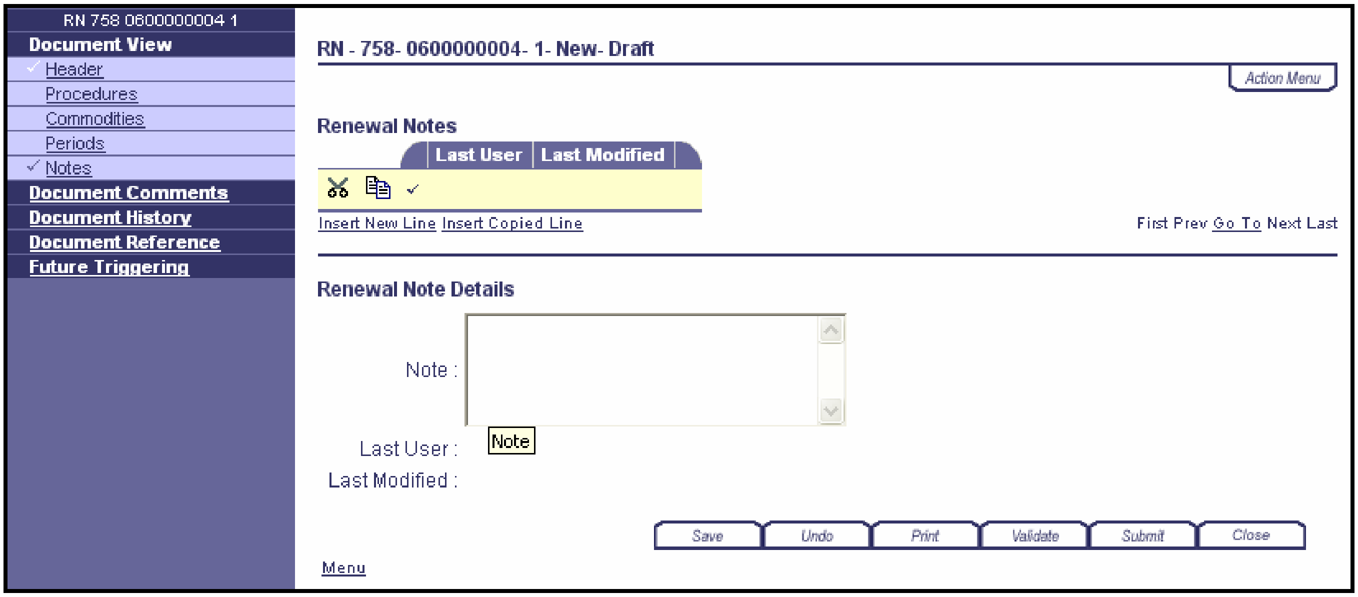
Required Fields	**Values**
Completion Date	**Enter Today's Date for each procedure by clicking each line in the grid to make the line active for update (turns yellow) and then entering today's date in the Completion Date field.**

8. Click **Periods** in the Secondary Navigation Panel.



Required Fields	**Values**
Disposition	**Renew.**

9. Click **Notes** on the Secondary Navigation Panel (Optional). Click **Insert New Line**



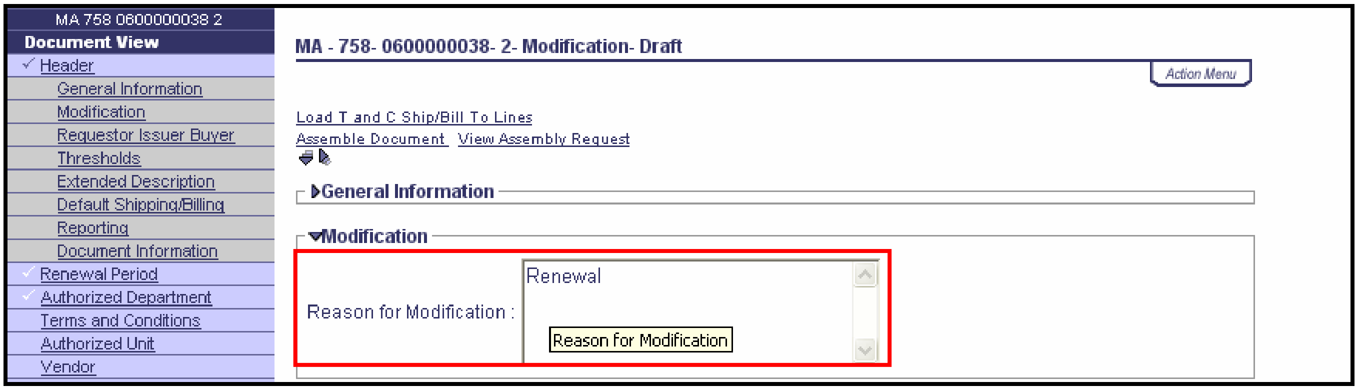
Required Fields	Values
Note	Vendor Performance met expectation

10. Click **Validate** and **Submit** links on the Renewal Document.

11. On the night of the **Renewal Effective Date**, the Renew Master Agreement Batch Job will automatically create a Master Agreement Modification document using the information from the Renewal document.

12. Use the **Document Catalog** to locate the Modification Draft of the Master Agreement created during the Batch Job.

13. Open and review the Master Agreement Modification document. You must provide a reason for the Modification in the Header. You may make additional changes to Terms and Conditions, as required.



Required Fields	Values
Reason for Modification	**Enter Renew for an additional year**

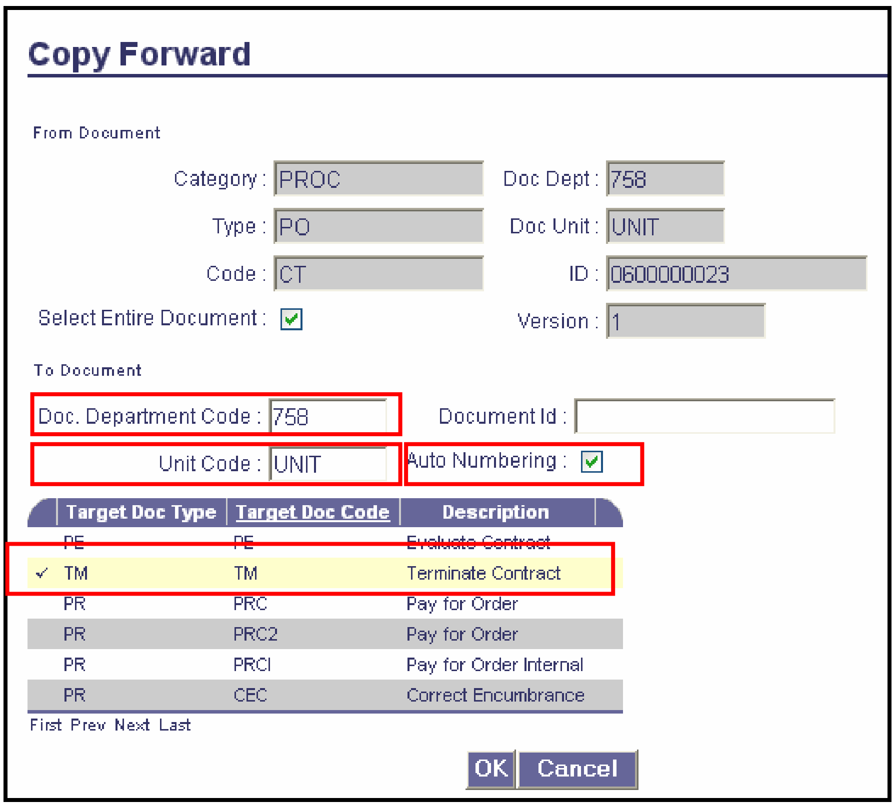
13. Once you have finished your review, click **Validate** and then **Submit** on the Master Agreement Modification document to send the document for approval.

10 –Contract Termination

Terminations are to be used in the unusual circumstance that you need to close out an Award document prior to its completion. Users should only create **TM** documents for termination for default and termination for convenience in accordance with 200 KAR 5:312. This will RARELY occur. This is a legal procedure and all activities must be fully documented on the **TM** form.
All others should be allowed to expire or have a regular modification processed to adjust the dates of service.

Terminate a Contract

Access the **Final Award** you would like to terminate (**MA**, **PO**, **CT**, **DO**) through the Document Catalog. **Copy Forward** to a Termination (**TM**) document.



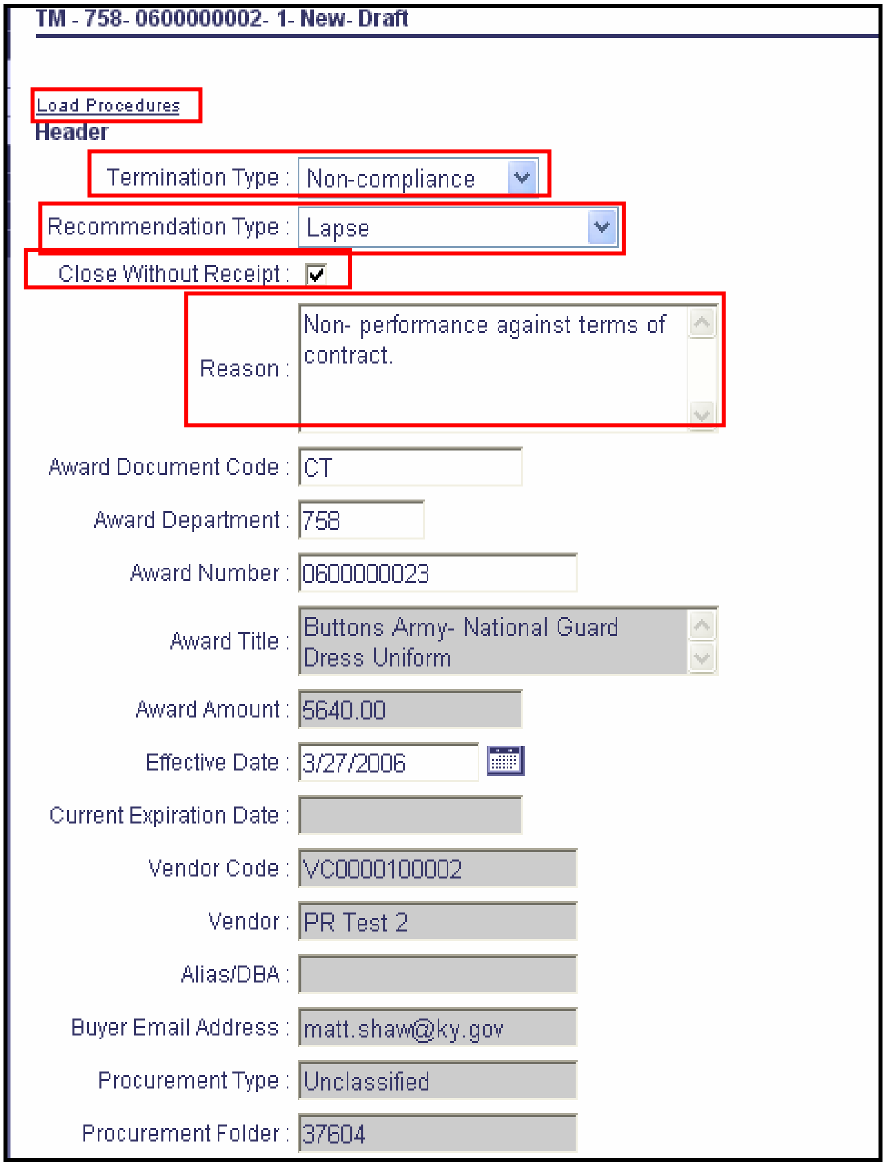
Select the **TM** entry in the Grid and provide the following:

- Enter **Doc. Department Code**.
- Enter **Unit Code**.

- Check **Auto Numbering** so that eMARS will use the next available incremental number when generating the Termination (**TM**) document's document identification number.

When you click **OK**, the Termination (**TM**) document will open to the Header section.

Complete the Termination (**TM**) Header. The Termination Header allows you to define what effect you would like the Termination (**TM**) to have on the award being terminated.



- Select a **Termination Type** to correspond to the circumstances of the Termination (**TM**): "Non-Compliance" or "Mutual Agreement". (Required)

- Select a **Recommendation Type**: “Reprocure”, “Award to Next Low Bidder”, or “Lapse”. (Required)
- Based upon conditions of the termination, you will select whether you want to **Close Without Receipt**. If “Yes” is selected, then outstanding purchase orders will be closed without receipt. If “No” is selected, then outstanding purchase orders will remain open for receipts and payments.
- The **Reason** field is used to document the rationale for the termination. (Required) The value entered in this field will populate the **Reason for Modification** field on the Award Modification that is generated when the **TM** is submitted.
- Complete the **Effective Date** with today’s date.(Required)

Click **Load Procedures**.

Click **Procedures** in the Secondary Navigation panel. Complete the Document **Procedures** section. Document when all mandatory Procedures were completed by entering the date on which they were completed. Procedures are recommended tasks that should be performed as part of the Contract Termination process.


TM - 758- 0600000002- 1- New- Draft

Action Menu

Termination Procedures

	Procedure Completed	Procedure Name	Required	Completion Date
	false	Notice Of Non-Compliance	false	
	false	Final Notice	false	
	true	Termination Notice	true	03/27/2006
✓	true	Contract Review Termination	true	03/27/2006

First Prev Go To Next Last

Termination Procedure Details

Procedure Completed : true

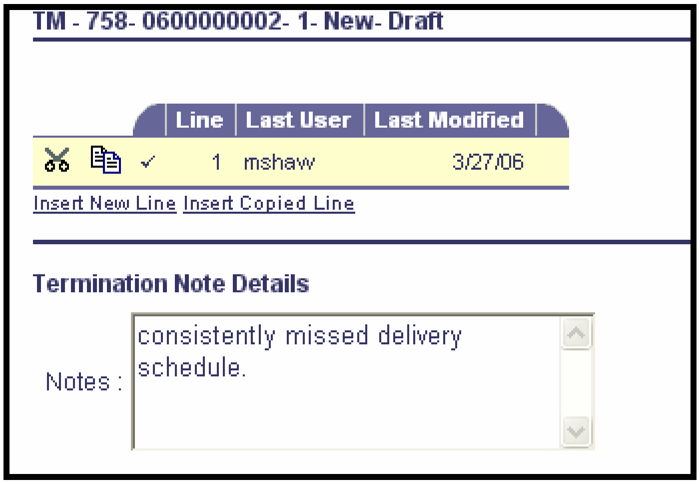
Procedure Name : Contract Review Terminati

Required : true

Completion Date : 03/27/2006

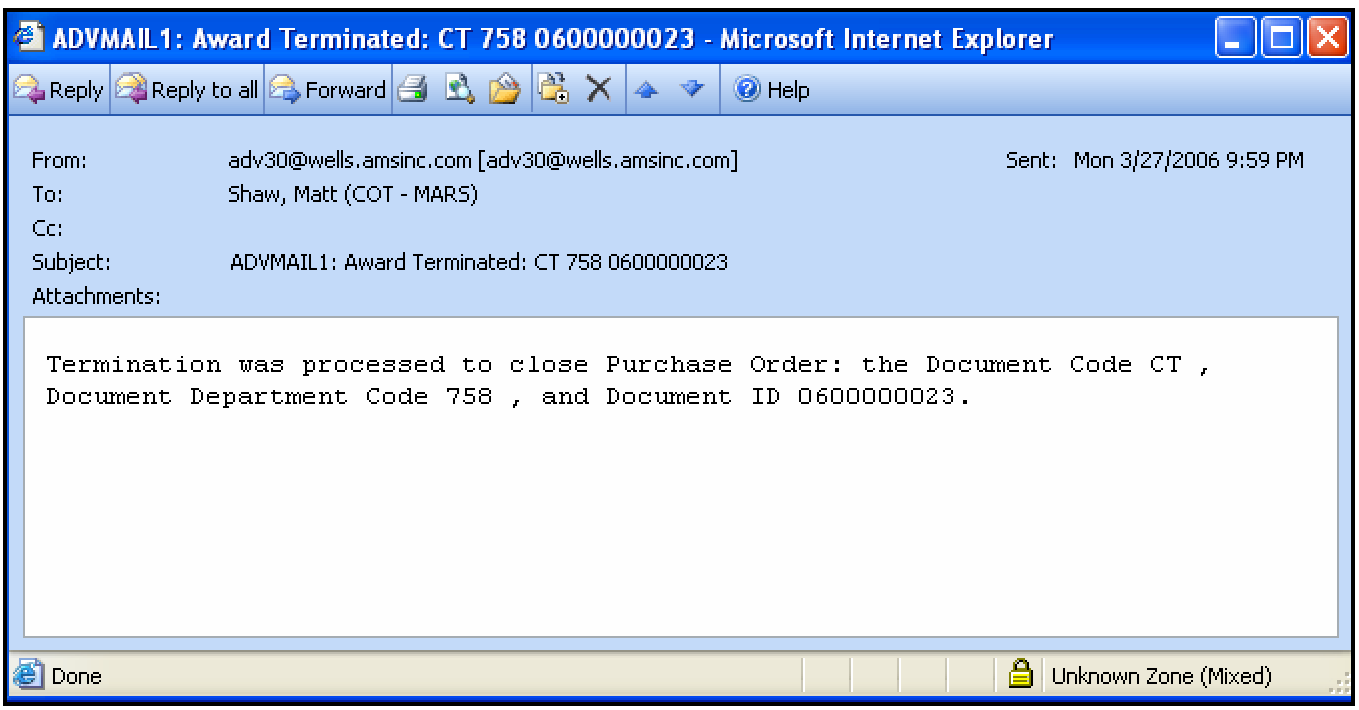
- For each Required Procedure, you will have to record a **Completion Date.**

Click **Notes** in the Secondary Navigation Panel. Add Notes to support your decision to terminate the Contract. (Optional)

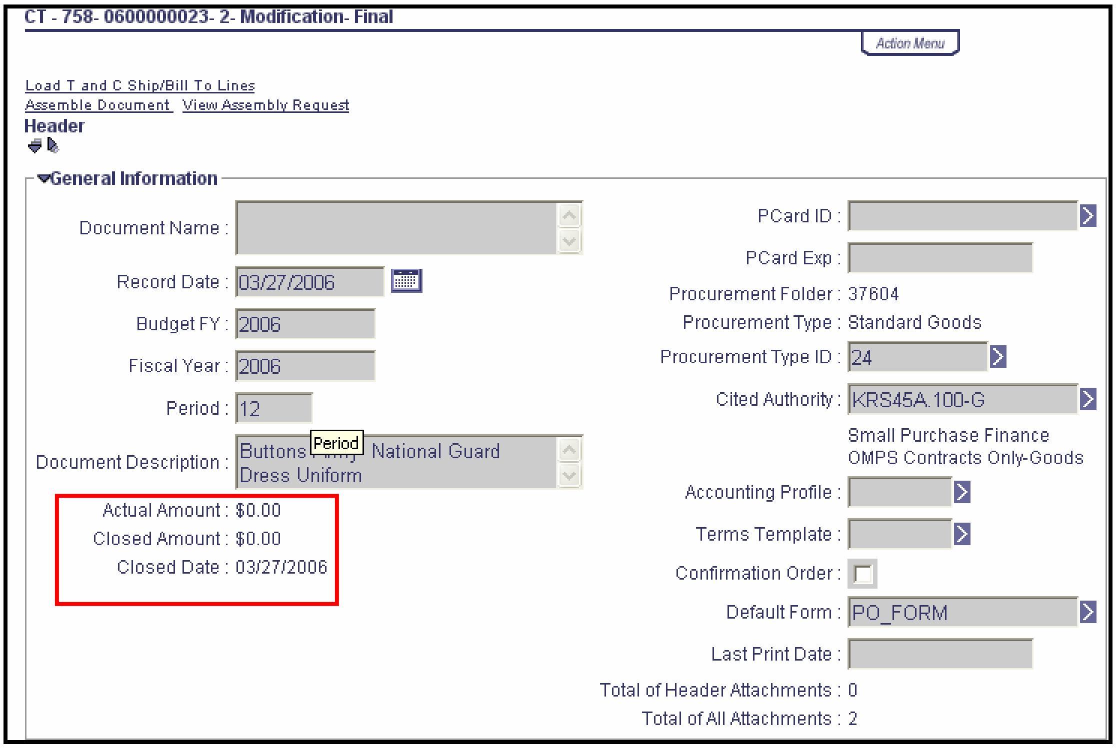


Click **Validate** and then **Submit** the Termination (**TM**) document to Final.

When the Termination (**TM**) Document is Submitted to Final, eMARS will notify the Buyer via e-mail that the Contract has been terminated.



When the Termination (**TM**) Document is Submitted to Final, a Modification document will be created that will effectively close out the award to prevent future receipts, invoice or payments from being processed. Furthermore, when the Award Modification is submitted, the Accounting postings will be reserved on the Accounting Journal. Click on **Submit** to Submit the modification to Final.



NOTE: If a Master Agreement (**MA**) is terminated and the **Close Without Receipt** check-box is selected then any Delivery Orders (**DO**) referencing the Master Agreement (**MA**) will also be terminated. Delivery Order modifications will be created and must also be Submitted to Final.

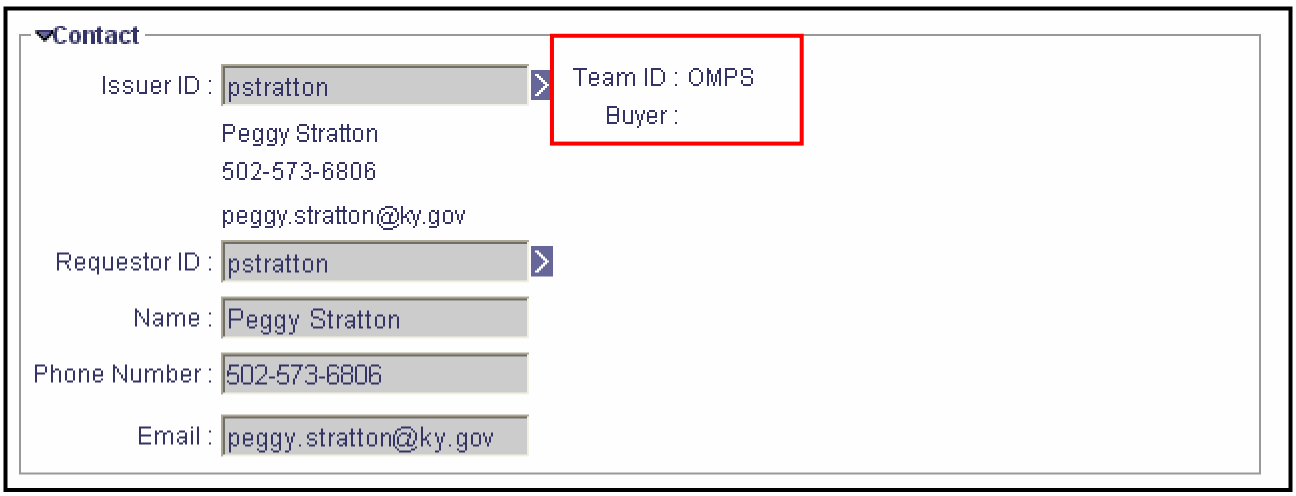
(This page intentionally left blank.)

11 – Managing the Procurement Workload

The Workload Management Module in eMARS consists of a series of Inquiries that allow you to track the Procurement Folders for which you are responsible.

These inquiries are designed to show the individual Buyer, a Team of Buyers, a Manager, and a Team of Managers what they are working on.

Files are automatically assigned to either a Centralized Purchasing organization workload, or to a Departmental Purchasing Organization's workload based on rules that have been set-up in eMARS. This update occurs when the document in question is Submitted to Final. To check which team has been assigned the file please inspect the **Contact** section.



The automatic logic to assign the file is based on the Department who entered the document, the first Commodity Code listed on the document, and the dollar value of that line. eMARS has dollar value rules based on a Department's Small Purchase three quote limit, Construction delegation, and non-professional services delegations that it uses to determine who should process the file.

Managers may decide to re-assign the file to a different Team after it has been initially submitted. They may also assign the file to an individual Buyer for processing.

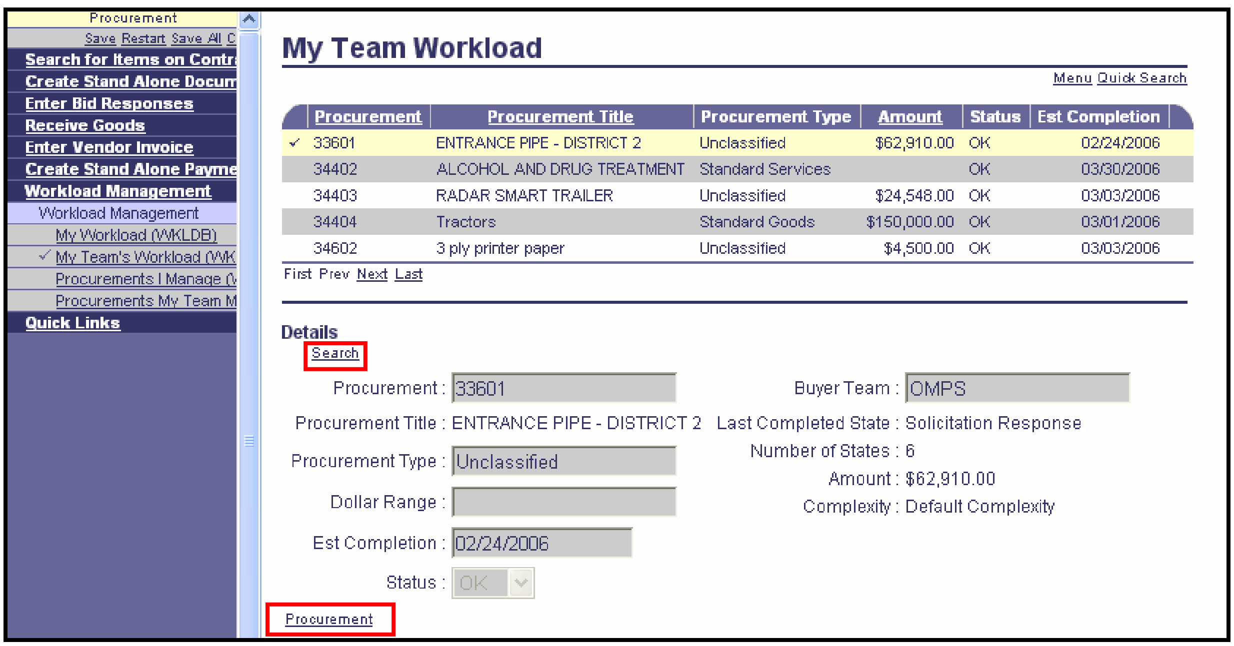
Procurement Folders will always be automatically assigned to a Team as outlined above. Once it has been assigned, Buyers can access the file from the **My Team's Workload** page. This page is filtered to show all the files that are assigned to a Team of Buyers to which the Buyer accessing the page belongs.

Procure Workload Management

Access your **Procurement Workspace**. Click **Workload Management** in the Secondary Navigation panel to open the Workload Management section. Click **My Team's Workload (WKLDBT)**

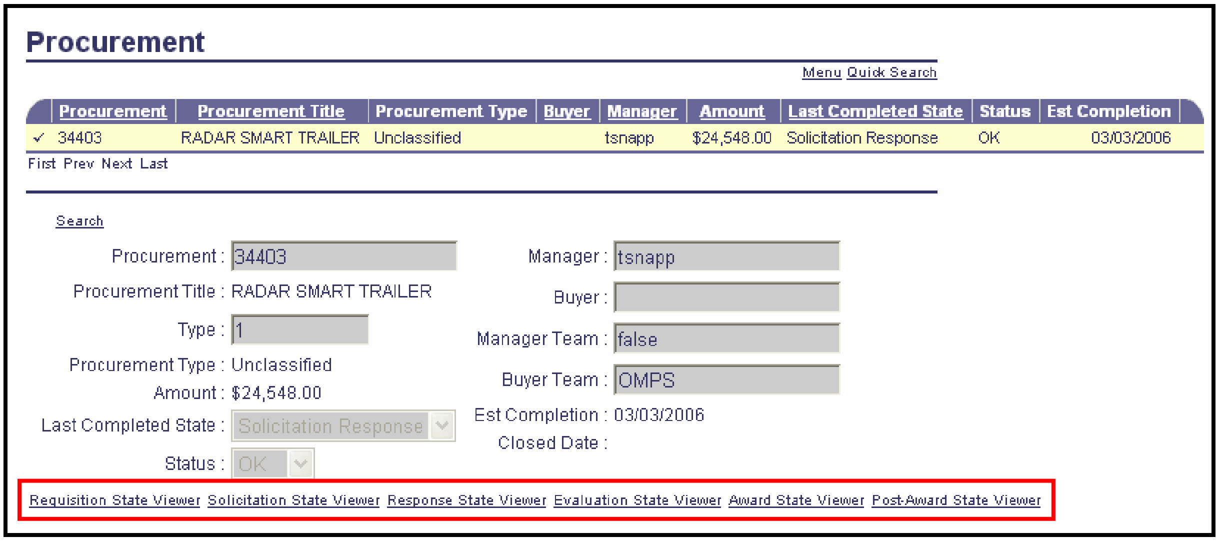
The **My Team Workload** page opens. This page lists all the Procurement Folders that have been assigned to your Team. This inquiry is initially sorted by the five-digit Procurement Folder ID. However, you can re-sort the inquiry by clicking on one of the underlined column headings.

> **NOTE**: If you click on the Procurement link once you transition to this page you will see the files that have most recently been assigned to your team.



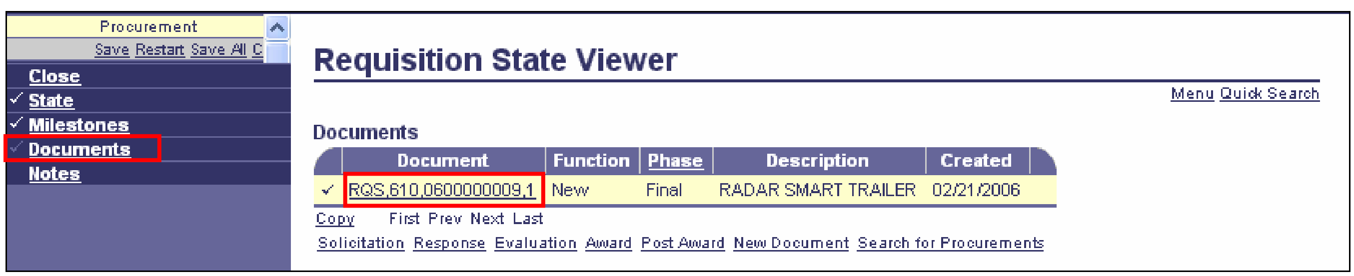
- **Search** opens a Standard eMARS search box where you may perform a wildcard search by **Procurement Folder ID**, or **Procurement Title**.
- Selecting a row in grid and clicking **Procurement** at the bottom of the page will open the **Procurement Folder** for inspection.

Select a row in the Grid and open the **Procurement Folder** by clicking **Procurement**. The **Procurement Folder** opens. The **Procurement Folder** view provides you with more information about the Procurement being processed.



Clicking one of the **State Viewer** Links will open the respective **State Viewer** where you may subsequently access the documents in that state.

Click **Requisition State Viewer** to open the Requisition document. When the State Viewer opens click **Documents** in the Secondary Navigation Panel.



Clicking the **Document ID** field will open the **RQS** where you may modify it or **Copy Forward** to the next document in the Procurement Chain.

NOTE: Only documents with a status of Final will be shown on the State Viewer inquiry.

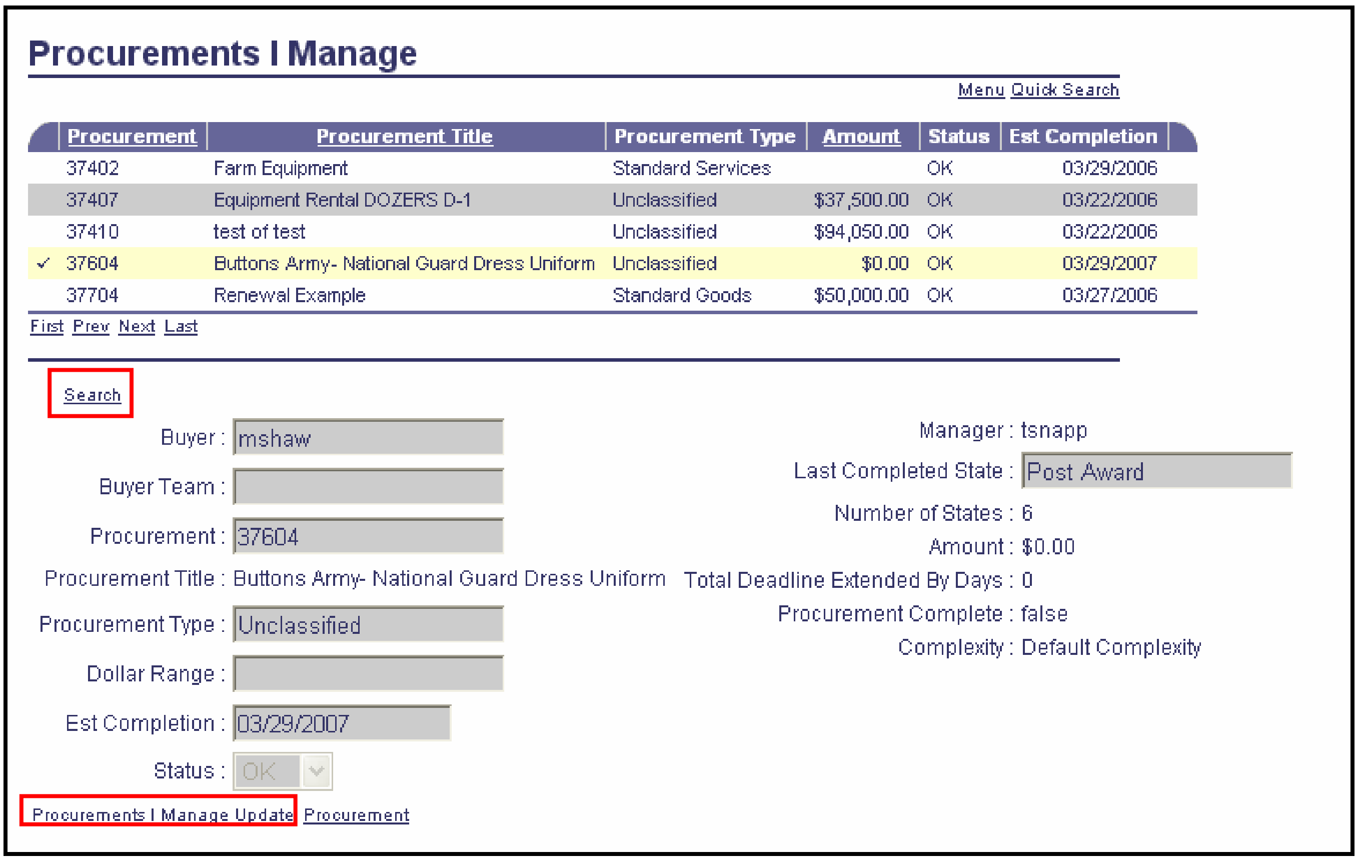
Manager's Workload Inquiry.

eMARS provides two inquiries for Managers to track the Workload of the Teams and Buyers for whom they are responsible: **Procurements I Manage** and **Procurements My Team Manage**. The

Procurements I Manage inquiry shows all Procurement Folders for the Buyers and Buyer Teams who report to the Manager accessing this inquiry. The **Procurements My Team Manage** allows a Manager to view all procurements that have been assigned under his/her Management Team. The Manager Team in Kentucky consists of all Central Managers from Kentucky Transportation Cabinet (KYTC), Department of Engineering and Contract Administration (DECA), and Office of Material and Procurement Services (OMPS). It will be used to transfer Procurements that were assigned incorrectly.

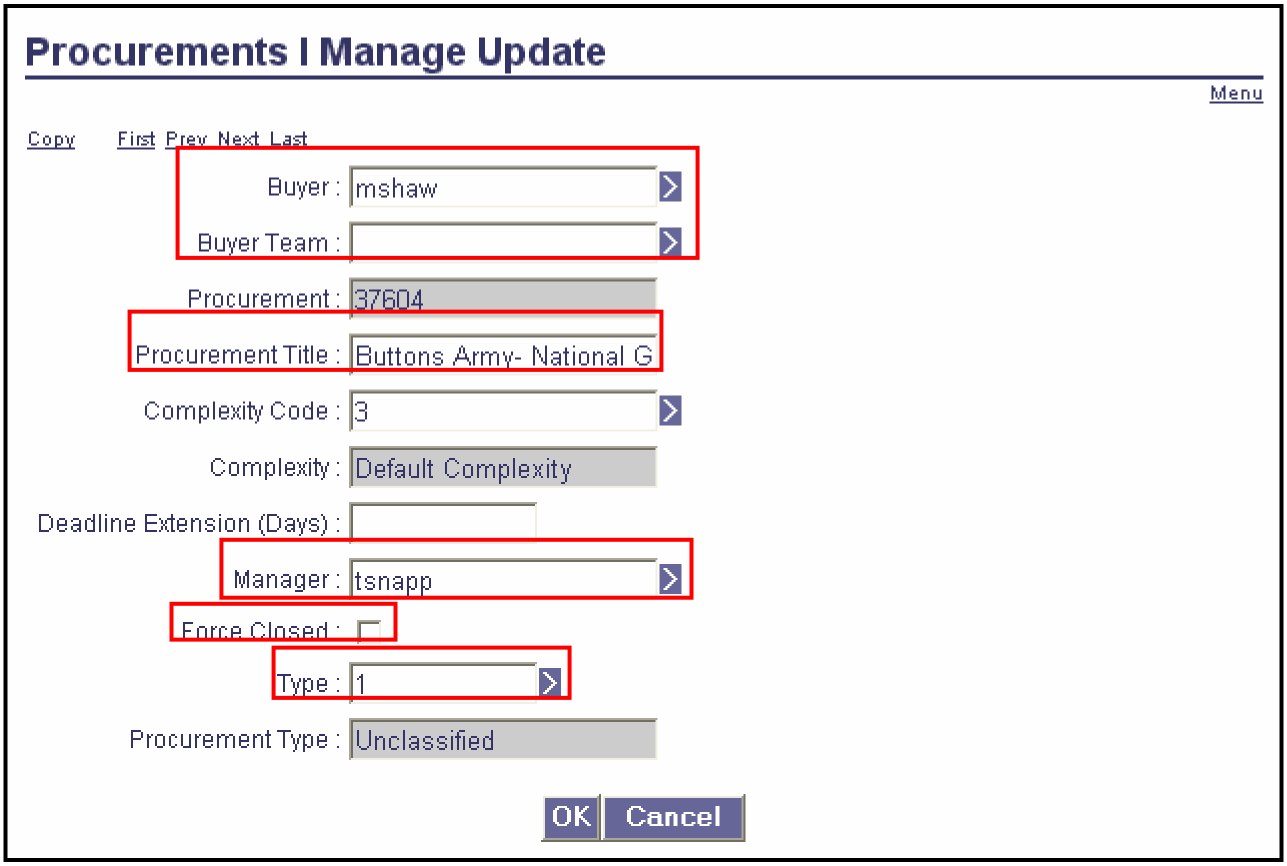
This inquiry is initially sorted by the five-digit **Procurement Folder ID**. However, you may re-sort the inquiry by clicking on one of the underlined column headings to sort by that value.

NOTE: If you click on the **Procurement** link once you transition to this page you will see the files that have most recently been assigned to your team.



- **Search** will open a Standard eMARS search box where you may perform a wildcard search by **Procurement Folder ID**, or **Procurement Title**.
- **Procurements I Manage Update** will open a new page where you may perform numerous functions including: reassigning the file to a different Team and closing the file out.
- Selecting a row in Grid and clicking **Procurement** at the bottom of the page will open the **Procurement Folder** for inspection.

Click **Procurements I Manage Update** to transition to the **Procurement I Manage Update** page. This page allows a Manager to assign a Buyer or a Buyer team to a particular procurement. The Manager can also change the **Procurement Title** and **Procurement Type**.



- Reassign the **Procurement Folder** to a different **Buyer** or **Buyer Team.**
- Reassign the **Procurement Folder** to another **Manager.** If you reassign the file to another Manager then the Folder will be removed from your view of this inquiry.
- **Force Close** a procurement that will never be completed.
- Change the **Procurement Type**.
- Change the **Procurement Title**.

Click **OK** to save your changes and Return to the **Procurements I Manage Page**.

12 – Online Inquiries

Lifecycle (LINQ)

The Lifecycle Inquiry (**LINQ**) page allows you to view the complete chain of documents associated with a selected search document**.** When a search is performed, the document entered as the search criteria must have a **Phase** of "Final" or "Historical Final".

The Lifecycle Inquiry (**LINQ**) page may be accessed directly from one of two places: **Procurement Document Inquiry** or the **Lifecycle Document Search.** The **Procurement Document Inquiry** (**PRCUDOC**) allows the user to search by **Procurement Folder ID**, **Procurement Title**, or **Document Department**, or **ID.** The **Lifecycle Document Search Inquiry** (**LFDOCSCH**) provides similar search capabilities to the Document Catalog with the addition of being able to search by **Document Description**.

13 – Session Review

Summary Review of *Topic*

You should now be able to:

- Conduct a Competitive Sealed bid using Solicitation (**RFB**), Solicitation Response (**SRW**) and Evaluation (**EV**) document
- Process a Stand-alone Contract (**CT**).
- Load a Catalog referencing a Master Agreement (**MA**).
- Process a Master Agreement Renewal (**RN**).
- Terminate (**TM**) a Contract or Master Agreement
- Re-assign a Procurement Folder to the correct Team.
- Track documents and work in progress using Lifecycle Inquiry (**LINQ**)

Summary Review of *Topic* Quizzes

Review Questions	
A	**Terms and Conditions** may only be attached as MS-Word documents saved as .**XML** True or False
B	The **TAB** key allows you to move between all required fields of the Commodity Grid on the **Solicitation Response Wizard** (**SRW**) document. True or False
C	You may download an EXCEL tabulation of all Bids received from the **EV** document action menu. True or False.
D	A **CT2** requires a Receiver to be processed in order for the Payment to be generated. True or False
E	Terminating a Master Agreement (**MA**) also terminates all Referenced Delivery Orders if the **Close Without Receipt** check-box is selected in Termination (**TM**) document Header. True or False

Logout

You will complete this exercise by logging out of eMARS.

1. Click **Logout**. This closes the eMARS application and ends your session. You can now close the open browser windows.

NOTE: Please remember to select Logout prior to closing your eMARS session.
Just closing the page will not immediately end your session.